



Plan the Bruce: **GOOD GROWTH**

Discussion Paper

September 2021

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1 Introduction

Bruce County is embarking on a journey to a new County Official Plan. Good planning decisions now will help us manage growth and change while sustaining our quality of life.

Bruce County is expected to continue to experience population and employment growth over the next 25 years. We must plan for growth by providing the basic services, infrastructure, jobs and affordable housing our expanding population will need.

Wise growth management practices and policy in our new Official Plan will enable us to balance growth in a sustainable and coordinated manner.

The Plan the Bruce: Good Growth discussion paper was prepared after community engagement and further analysis on recommended directions as proposed in the Plan the Bruce: Good Growth Interim Report.

2 Community Engagement

The County's Growth Management Strategy (GMS) has been broadly informed through engagement and consultation with County Council, local municipalities, key stakeholders and members of the community. This has provided an opportunity for input to how growth and change within the County will be managed over the next 25 years. Managing this change will principally occur through the policies of the County's new Official Plan (OP) and this Discussion Paper is a key input to developing a policy framework that directs how and where the County will grow. Responsibly managing this growth and change is a core function of land use planning and one that benefits from the broad input and perspectives of a community.

The community was invited to be involved with the Plan the Bruce: Good Growth Discussion Paper and offer meaningful input in a variety of ways. Engagement outreach for the project included a social media campaign, Radio ads, Newspaper advertisements, direct outreach to stakeholders and municipalities and delegations by request to 2 local councils and committees. Community engagement highlights include:

- 1254 visitors to the project web site
- 63 web site survey responses and 5 written comments
- Development-industry workshop
- Meetings with staff from each of the eight municipalities.

3 What We Heard, Analysis, and Directions

This section summarizes results from engagement, additional staff analysis, and includes recommended directions.

3.1 Bruce County is Growing

As identified in the March, 2021 Plan the Bruce: Good Growth Interim Report, Bruce County was forecast to achieve a population of 86,200 and employment of 40,500 by the year 2046. In Chapter 5 of the Plan the Bruce: Good Growth Interim Report, this County-wide growth was allocated to each local municipality.

What we heard

When presenting these growth allocations to each area municipality, a common theme emerged that the housing growth outlook was too low. Many of the area municipalities have been experiencing unprecedented housing growth since the onset of the COVID-19 pandemic and wanted the forecast updated to reflect the short-term growth pressures being experienced in the housing market, the quantity of housing units in new active development applications and how recent housing market trends are expected to continue into the longer term.

Analysis

The Consultant Team analyzed updated area municipal housing supply and active development applications to discern if significant changes in the growth outlook had occurred since the initial analysis in April, 2020. The results of this analysis, as well as a review of updated Ministry of Finance Spring 2021 Population Projections, indicate that there is a stronger near-term and longer-term growth outlook across the County's area municipalities than previously identified in the Plan the Bruce: Good Growth Interim Report.¹

¹ Ontario population projections. Learn about the 2020-2046 population projections for Ontario and its 49 census divisions. <https://www.ontario.ca/page/ontario-population-projections#section-6>

Recommended Directions

In response to this information, the Consultant Team revised the population, housing and employment growth forecast for Bruce County and updated the area municipal growth allocations. If the County's growth outlook were to significantly change within the next several years, there would be an ability to re-open and update the County-wide growth forecast within five- to ten-years time as part of the County's next OP review. A significant positive change in the growth outlook could occur if, for example, South Bruce becomes the location of the Nuclear Waste Management Organization (NWMO) nuclear waste disposal site.

The following Growth Profile provides the details regarding the updated Bruce County population, housing and employment forecast from 2021 to 2046 (see Appendix A for additional details).

Updated Bruce County Growth Profile

A key driver of the County of Bruce's future population and economic growth potential is its geographic location within Ontario. Bruce County is located to the west of one of the fastest growing Cities/Regions in North America, known as the Greater Golden Horseshoe (GGH).

As identified in the Growth Plan, 2019 (A Place to Grow, amended 2020), the long-term outlook for the GGH is positive, characterized by strong population growth primarily through migration, fueled by economic growth that is concentrated in large urban centres. The rate and distribution of growth throughout central Ontario, in particular the GGH, is of key significance to Bruce County. As greenfield lands within the more mature areas of central Ontario gradually build out, increasing outward growth pressure will be placed on municipalities within proximity to the GGH Outer Ring and beyond.

In contrast to the Province's largest urban centres, population and housing growth in Bruce County is largely driven by net migration from other areas of the Province, as opposed to immigration. For Bruce County, COVID-19 has acted as a near-term driver of future housing growth led by increased opportunities for remote work and the reconsideration by some Ontario residents to trade "city lifestyles" for "smaller town living." It is recognized, however, that the longer-term population and employment growth potential for Bruce County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand in Bruce County over the long term.

Relative to the larger municipalities in the GGH Outer Ring (e.g. City of Waterloo, City of Kitchener and City of Guelph), average housing prices in Bruce County are lower and more affordable relative to local income. However, as housing prices continue to steadily rise across the County, it is foreseeable that an increasing proportion of the population in Bruce County, particularly younger generations, will be accommodated in various forms of medium and high-density housing (i.e. townhomes, walk-up apartments, triplexes, and low-rise apartments).

The County's 55+ age group has grown considerably over the past 25 years and is expected to increase in both percentage and absolute terms over the next several decades, largely due to the aging of the County's Baby Boom population. The aging of the County's population base is anticipated to place downward pressure on the rate of population and labour force growth within the County over the long-term given declining population growth resulting from natural increase (i.e. births less deaths) combined with downward pressure on the regional labour force participation rate.

Bruce County continues to remain an attractive location for seasonal residents, particularly within its shoreline communities and other waterfront areas. By 2046, the County's seasonal population base is forecast to reach 36,500 persons, which represents an increase of 5,700 estimated seasonal residents as of 2021.² It is important to recognize the weight that the seasonal segment of the population has on future housing demand, infrastructure needs, economic development and municipal services. Market demand for seasonal housing is largely anticipated to be driven from residents within the GGH, and to a lesser extent, other larger urban centres within southern Ontario located within a two- to three-hour drive of Bruce County's waterfront and rural areas.

² Seasonal population is defined as residents who own and occupy second homes with the County. The average household size of a seasonal dwelling in Bruce County is estimated at 3.58. Existing seasonal household estimates have been determined through current Municipal Property Assessment Corporation (MPAC) data.

The results of the long-term growth forecast and urban land needs analysis is summarized below:

County-Wide growth forecast, 2021 to 2046 (Appendix A):

- Permanent population is expected to reach a 2046 total of 93,600, increasing by approximately 73,500 from 2021.
- By 2046 the County's permanent housing base is forecast to increase to 40,100 households from 30,500 in 2021. This represents an increase of 9,600 households.
- Over the 2021 to 2046 projection period, new housing is forecast to be comprised of 49% low-density (singles and semi-detached), 32% medium-density (townhouses) and 19% high-density (apartment) units.
- Over the next 25 years, 63 net seasonal housing units are forecast to be developed annually, totaling approximately 1,600 net seasonal units across the County.
- The employment base within the County is expected to increase from approximately 33,800 in 2021 to 43,000 in 2046, representing an increase of 9,200 jobs.
- Combined permanent and seasonal population is forecast to reach 130,100 in Bruce County by 2046, representing an increase of 25,700 people over the 2021 to 2046 period.

Growth allocations, 2021 to 2046 (Appendix B to D):

- All municipalities in Bruce County are forecast to experience both population and job growth, to varying degrees, over the forecast period.
- The Town of Saugeen Shores is expected to accommodate the largest share of permanent housing growth over the 2021 to 2046 forecast period, with 34% of County-wide new housing development.
- Urban Communities within the County are expected to accommodate 93% of all County-wide household growth, with rural areas capturing the remaining 7%.
- Forecast employment growth within the County is anticipated to be concentrated within the Municipality of Kincardine and the Town of Saugeen Shores.
- Of the total 9,200 jobs forecast for Bruce County between 2021 and 2046, approximately 8,100 jobs (88%) are expected in the County's Urban Communities and approximately 1,100 jobs (12%) in rural areas.
- The largest share of seasonal housing growth is anticipated in the Municipality of Northern Bruce Peninsula (65%) and the Town of South Bruce Peninsula (19%).

Residential and Non-Residential Land Needs by 2046 (Appendix E and F)

- Comparing the anticipated housing development yield of the County's designated vacant urban residential lands and opportunities for intensification (17,570 housing units), against forecast urban housing demand over the next 25 years (8,680 units), generates a potential surplus of approximately 8,890 housing units by 2046.
- Based on the residential land needs analysis, all Bruce County municipalities have an adequate supply of residential land to accommodate housing demand over the next 15 years. It is important for Bruce County to continue to monitor growth and urban land supply on an annual basis to ensure that urban residential development is not constrained prior to the County's next OP review. Appendix E provides additional details regarding the residential land needs by local municipality and Primary and Secondary Urban Area.
- All Primary and Secondary Urban Communities are forecast to experience an Employment Area land surplus by 2046, with the exception of a 25 gross ha deficit in the Saugeen Shores Urban Community and a 6 gross ha deficit within Brockton's Walkerton Urban Community. See Appendix F for additional details.³

³ Gross land needs include land requirements associated with local infrastructure and (e.g. local roads, stormwater ponds, utility easements, etc.). Employment Area expansion within Saugeen Shores and Walkerton may also need to consider additional land need adjustments associated with non-developable environmental areas/natural features and/or hazard areas.

3.2 Defining a Regional Market Area

The Province defines “regional market area” (RMA) in reference to an area that has a high degree of social and economic interaction. The upper- or single-tier municipality, or planning area, will normally serve as the regional market area. Under Provincial policy, the Bruce County OP will need to contemplate a definition of “regional market area” that is reflective of geographies that demonstrate social and economic synergies.

What we heard

Considering the size and diversity of Bruce County, the Consultant Team initially proposed a ‘sub-regional’ approach to the RMA, as discussed in the Interim Report, which categorized the area municipalities in the following way:

- Peninsula Sub-Region: South Bruce Peninsula and Northern Bruce Peninsula;
- Lakeshore Sub-Region: Saugeen Shores and Kincardine; and
- Inland Sub-Region: Arran-Elderslie, South Bruce, Brockton and Huron-Kinloss.

The basis for defining the RMA at the sub-region model included two key considerations:

- First, defining housing affordability would be based on income and housing prices within the context of the sub-region RMA model, rather than the entirety of Bruce County.
- Second, the residential land needs analysis could be calculated sub-regionally rather than at the County level. In the event that an area municipality is forecast to experience a shortfall of residential land by 2046, the justification for urban expansion would be based on the availability of land at the sub-regional level rather than at the County level.

Through consultation, the RMA was identified as a concern for several Bruce County municipalities. Feedback was received indicating preference for the RMA to be defined at the municipal level, which would provide municipalities with the ability to expand urban boundaries if a shortfall of residential land exists locally. An area municipal RMA would also allow area municipalities to define affordability based on local conditions, but this was identified as less of a concern.

County Housing Services staff were consulted and were supportive of the sub-regional approach.

Analysis

Based on the feedback from the area municipalities, the Consultant Team and Bruce County staff met with staff from the Ministry of Municipal Affairs and Housing (MMAH) to discuss the RMA. Through this discussion, the MMAH suggested that the RMA may have differing definitions depending on the context. When discussing the RMA within the context of affordability, there may be an opportunity to define it at the sub-region level. When analyzing urban land needs, however, the MMAH indicated that the RMA should be at the County level or alternatively, could potentially be defined through two sub-regions based on precedent in other parts of the province. If the RMA were to be defined through two sub-regions, it would need to be justified and rationalized with the MMAH. Provincial staff also advised that RMAs based on lower-tier boundaries would not be supported.

Within a land needs context, the RMA is an important consideration. For example, if an area municipality is forecast to experience a residential land shortfall by 2046, the ability to expand an urban boundary to accommodate growth would be subject to the availability of land in the remainder of the sub-region. If a surplus of residential land exists within the sub-region, then urban expansion would not be permitted in accordance with the Provincial Policy Statement (PPS), 2020.

Establishing an appropriate framework for the RMA and defining affordability within this context is also an important consideration. The Province's definition of affordable is directly associated with housing ownership and rentals. In the former, affordable ownership can be defined as "housing for which the purchase price is at least 10 per cent below the average purchase price of a resale unit in the regional market area". Affordable rental housing can be defined as "unit for which the rent is at or below the average market rent of a unit in the regional market area".

On this basis, defining 'affordable' at the County level is likely not representative of the variation in housing markets across different municipalities and areas within the County. More specifically, what is experienced as 'affordable' in one area may not be experienced as 'affordable' in another. These are important considerations especially within the context of human service delivery to ensure that programs and housing are predicated on areas within the County that share a high degree of economic and demographic synergies.

Overall, an approach to defining the RMA needs to be thoughtful, responsive to local conditions, and rationalized within the context of provincial policy directions.

Recommended Directions

In response to stakeholder feedback, the following recommendations are offered in regard to defining the RMA:

Affordability

It is recommended that the RMA be defined at a sub-County level and within three sub-regions. The sub-regional model for defining housing affordability would categorize the area municipalities as follows:

- Peninsula Sub-Region: South Bruce Peninsula and Northern Bruce Peninsula;
- Lakeshore Sub-Region: Saugeen Shores and Kincardine; and
- Inland Sub-Region: Arran-Elderslie, South Bruce, Brockton and Huron-Kinloss.

Land Needs

It is recommended that land needs be determined at the County level. As shown in the land needs sections above, all Bruce County municipalities have an adequate supply of residential land to accommodate housing demand over the next 15 years so establishing RMAs at a sub-regional level do not significantly change the outcome of the land budget analysis. There remains an opportunity to reassess the County's urban land needs and re-examine the definition of the RMA within Bruce County through other planning processes should future growth warrant such a review, including through the County's next anticipated Official Plan update in approximately 10 years.

4 Recommended Policy Directions

4.1 Growth Management Recommended Policy Directions

Responsibly Manage Municipal Servicing Infrastructure

Opportunities and Challenges

Good growth management requires that municipalities understand and plan for municipal servicing and infrastructure requirements over the planning horizon. Planning for growth within the context of municipal servicing and infrastructure contributes to building sustainable, resilient, efficient and complete communities in a financially responsible manner. The GMS has identified that the County will realize growth over the planning horizon which may require maintaining or enhancing servicing capacity within some municipalities. The Bruce County OP will therefore need to establish policies that provide direction to local municipalities regarding the provision of available and planned servicing to accommodate future growth through an efficient and sustainable framework.

Growth management requires that future development is planned in a manner that responsibly manages long-term fiscal impacts and full lifecycle costs of infrastructure and needs. In keeping with the findings of the ‘Homes’ discussion paper, an oversupply of infrastructure can represent a fiscal burden to municipalities; alternatively, an undersupply of servicing infrastructure may constrain future growth and limit opportunities for new housing within the County. The findings of the GMS are therefore an important planning tool that can be used by both the County and the municipalities to plan for servicing infrastructure in a responsible manner that supports future growth and contributes to building more complete communities.

Recommended Policy Directions

- Policies of the County’s new OP should continue to direct growth in a planned, orderly and phased manner to ensure existing or new infrastructure and services are sufficient to meet the forecasted growth needs of municipalities as identified through the County’s new OP.
- The phasing and staging of future development within settlement areas is required to be based on existing or planned municipal infrastructure servicing capacities. Policies of the County’s new OP should provide direction to develop multi-year municipal servicing plans as a component to local official plan review processes based on the County’s growth management work.

- Consistent with Provincial policy, the County's new OP should continue to direct most growth to areas where full municipal servicing or communal servicing systems are available and where there is capacity.
- Growth in areas where only partial or individual on-site servicing is available should only be permitted in certain land use designations and/or certain permitted uses. Otherwise, partial or individual on-site servicing should generally be limited or restricted under the policies of the County's new OP.
- The County will need to continually monitor, evaluate and coordinate with local municipalities to ensure that sufficient municipal servicing infrastructure within the Urban Communities is available, or planned for, in order to support the growth objectives of the County's new OP and that there is servicing capacity to accommodate this growth, including development through intensification and infill.
- Policies of the County's OP should continue to provide direction for the eventual availability of full municipal services in all Urban Communities as the preferred method of infrastructure and servicing.
- For local municipalities that are forecast to realize slow growth or near "no growth" scenarios in some settlement areas, policies of the Bruce County OP may provide direction to ensure existing municipal infrastructure is sustainable and resilient over the long-term planning horizon.
- The Province requires that municipal servicing be provided in a manner that is sustainable, recognizes the impacts of climate change, and is feasible and financially viable, and protects human health, safety and the natural environment.

Maintain a Distinct Settlement Area Structure

Opportunities and Challenges

The existing settlement area structure established by the County's OP contributes to the responsible, coordinated and efficient management of land and resources. Settlement areas are generally defined as lands within a municipality that are planned to accommodate most of the forecasted growth and have sufficient existing or planned municipal servicing and infrastructure capacity to do so. The Province also places particular emphasis on the role of settlement areas regarding the long-term economic prosperity of communities. This framework enables growth related outcomes that advance principles of 'good planning' such as environmental protection, fiscal responsibility, and the efficient use of land and resources.

While growth projections and associated land use needs may vary throughout the County, in all cases directing future growth into settlement areas should contribute to the responsible use of land and resources and promote the effective use of existing or planned municipal infrastructure and public services. Directing a majority of growth to settlement areas also contributes to the longer-term protection of natural heritage and agricultural lands.

Focusing growth within settlement areas can also lead to a greater range and mix of housing options, while contributing to improved economic opportunity for residents. Encouraging the continued growth of settlement areas therefore contributes to complete and resilient communities. Complete communities are places that offer a mix of uses and support opportunities for people of all ages and abilities to access jobs, everyday amenities, public service facilities, and transportation options.

The County's new OP has an important role in planning for growth and change over the planning horizon. A key way this is achieved is by maintaining a hierarchy of settlement areas that establishes a structural framework for both the County and municipalities to plan and accommodate for growth and change.

Recommended Policy Directions

- Future growth within the County will occur in accordance with a hierarchy of settlement areas and land use designations. This policy framework advances principles of good planning by directing future development to the Primary and Secondary Urban Communities, thereby optimizing existing infrastructure, creating compact, complete and resilient communities and protecting natural heritage resources and agricultural land.

- In accordance with the growth projections for each area municipality, policies of the Bruce County OP may also include more specific growth projections of the Primary and Secondary Urban Communities, Hamlet communities, and rural areas. For example, Tables 1 and 2 of Policy 4.4.2.7 should be comprehensively updated in this regard.
- More modest growth may be planned for in the Hamlet communities and rural areas of the County, provided the policy framework is consistent with Provincial policy regarding the provision of services and protection of natural heritage and agricultural lands. Large-scale residential development within the Hamlets and rural areas of the County should not be contemplated by policies of the County's new OP where there is not sufficient existing or planned service capacity.
- The County's OP should contemplate policy direction to local municipalities that encourages land use structures that similarly optimize existing infrastructure, creating compact, complete and resilient communities, provide a range of housing options, and protect natural heritage resources and agricultural land.
- Settlement area land use designations established by the County's new OP should be appropriately flexible to not only achieve desirable intensification and density targets to lower development costs, but also to permit more types of homes and greater economic opportunities.
- The County is experiencing unprecedented growth pressures and an appreciating housing market that is becoming unaffordable for some residents. Together with the 'Homes' discussion paper, the County's new OP may contemplate a policy framework that establishes a range of enabling policies that aims to increase the supply and mix of homes, while reducing cost related barriers to housing.
- Directing future growth to settlement areas can contribute to the viability of implementing other planning tools that will advance the land use planning priorities of the County and municipalities. This may include, for example, the Community Planning Permit System, Community Benefit Charge, Inclusionary Zoning, Community Improvement Plans, and pre-zoning, as generally contemplated in the 'Homes' discussion paper.

Plan for Permanent Population Growth

Opportunities and Challenges

Permanent population growth contributes to the overall wellbeing of a community and is an important indicator of vitality. Identifying permanent population growth projections enables decision makers, municipal staff and members of the community to transparently understand where and how growth will occur. It also enables municipalities to responsibly plan for and manage the necessary servicing needs to facilitate growth in a manner that builds complete, sustainable and resilient communities.

The County is projected to experience permanent population growth in all local municipalities over the planning horizon. However, this growth is not evenly allocated as evidenced by a degree of variation in growth projections among the municipalities, with some settlement areas experiencing slow growth or near “no growth” forecasts.

Planning for growth (or ‘growth management’) is an important function of the County under the Provincial land use planning framework. Growth management is a coordinated and collaborative effort between the Province, County and municipalities. The County’s new OP will therefore have a critical role in directing where and how growth will occur by establishing a policy framework that is consistent with Provincial policy while enabling the responsible management of growth over the planning horizon.

Recommended Directions

- Policies of the County’s OP will need to be updated to reflect and be consistent with the population growth projections as determined through the GMS over the planning horizon. This includes establishing overall growth projections for each of the eight municipalities.
- In addition to identifying growth projections for each municipality, policies of the Bruce County OP may also include more specific growth projections for the Primary and Secondary Urban Communities, Hamlet communities, and rural areas. Each of these areas serve a distinct function within the County and it may be appropriate to develop a policy framework that is based on projected growth within the settlement hierarchies.
- Policies of the County’s new OP will need to recognize and provide direction regarding the disproportionate nature of growth projections among the municipalities, including that some municipalities should plan for modest and in some cases near “no growth” scenarios over the planning horizon in some settlement areas.
- Establish policies that are considerate of a range of planning tools to facilitate, encourage and advance desirable planning outcomes, such as ‘housing first’ policies.

- While population and employment growth will largely be directed to the County's Primary and Secondary Urban Communities, it recognized that the County's Hamlet Areas and rural lands have a role to play in accommodating limited, small-scale residential growth and sustainable economic development.
- Where the GMS has identified permanent rural population growth, policies of the Bruce County OP will need to be consistent with Provincial policy regarding the provision of unjustified and/or uneconomical expansion of infrastructure while establishing a clear policy framework for how and where growth will occur.
- In accordance with the findings of the GMS, municipalities will need to ensure that an appropriate amount of land supply is available to accommodate projected residential growth over the planning horizon. Phasing policies and municipal servicing plans may need to be undertaken to ensure that servicing of future development is being responsibly allocated in this regard.

Plan for Seasonal Population Growth

Opportunities and Challenges

The County is afforded an incredible natural setting with many recreational opportunities, and it is therefore a desirable location for seasonal residences and visitors alike. Similar to permanent population growth, identifying seasonal population growth enables municipalities to better plan for and manage a range of municipal servicing policy considerations. Seasonal population growth within the County is projected over the planning horizon within the local municipalities of Northern Bruce Peninsula, South Bruce Peninsula, Saugeen Shores, Huron-Kinloss, Kincardine, and Arran-Elderslie.

The needs and requirements of seasonal population are often different from the permanent population in regard to public services, infrastructure, housing and employment. In addition, new opportunities for remote work are being widely adopted, and this may have an impact on the traditional role of seasonal residences within the County. Further, it has been observed in other jurisdictions that seasonal residences offered as short-term rentals can have a limiting impact on local housing supply.

Recommended Policy Directions

- Seasonal population projections provide direction to municipalities and can inform growth-related policy considerations related to human and physical servicing.
- Implement the seasonal population growth projections identified through the GMS by establishing policies that contemplate those projected seasonal growth trends over the planning horizon.

- Consideration may be given to strengthening seasonal-to-permanent dwelling conversion policies. Currently, the OP establishes conversion policies that apply to the Rural Recreational Area and the Inland Lake Development Area land use designations. However, the GMS has identified some seasonal growth within the Urban Communities of the County. Consideration may be given to establishing a more robust conversion policy framework that applies to the Urban Communities to appropriately manage and provide direction on growth projection and servicing implications where conversions may occur.
- Establish an enabling policy framework to support conversion by-laws or regulate short term rentals through regulatory land use planning frameworks, where determined to be locally appropriate.

Develop a Robust Plan Monitoring and Evaluation Framework

Opportunities and Challenges

The County's growth management work provides critical input to long-range planning by identifying future growth, land needs and housing supply. Plan monitoring and evaluation frameworks provide a critical feedback loop to municipalities that enables better land use decision making and associated outcomes. Robust data tracking, collection and sharing can also be effectively used to inform future growth management exercises and local planning processes. A monitoring and evaluation framework often includes supply and demand data, while contemplating a range of planning policy, demographic and economic factors that influence growth over the planning horizon.

The County has an important role in implementing a robust plan monitoring and evaluation framework that evaluates key performance indicators to track growth management related objectives. A plan monitoring and evaluation framework contributes to understanding if growth and intensification targets are being met, and if municipal infrastructure is being developed in a manner that is financially viable with sufficient capacity to accommodate growth. The responsible and sustainable management of growth and change over the planning horizon requires an understanding of County and local municipality market conditions, development trends, and land consumption rates, which can be monitored and evaluated through the framework.

Recommended Policy Directions

- Establish a plan monitoring and evaluation framework that regularly evaluates the forecasts of the GMS given the dynamic nature of the County's population growth and demographics. Any growth management exercise undertaken by the County should be conducted in consultation with local municipalities.

- Data gathering should include key performance metrics such as market demand, land supply (in all stages of approvals) and development information (such as lot creation, housing type, location and tenure).
- Policies establishing direction for regular plan monitoring and evaluation may include a robust framework that enables the County and local municipalities to modify growth objectives based on actual supply and demand data, while contemplating a range of planning policy, demographic and economic factors that influence growth and change over the long-term planning horizon.
- Policies of the Bruce County OP may establish a clearer framework for land use data management and sharing between the County and local municipalities. This may include policy direction to develop a robust data management infrastructure, to ensure the nature of data being collected is consistent among municipalities.
- Collaborate with Human Services and provide information and outputs associated with the plan monitoring and evaluation framework. This information may be used to inform other County initiatives and advance associated priorities. The plan monitoring and evaluation framework may provide data that can be used to analyze demographics, market rents and affordability or attainability, to inform a broader understanding of housing needs within the County.

4.2 Residential Recommended Policy Directions

Update County-wide Housing Projections

Opportunities and Challenges

The County is growing and a greater range and mix of housing is being developed throughout the municipalities. Housing is an area of Provincial policy interest and planning for a range and mix of housing contributes to building complete communities and contributes to economic development. Through the County's new OP, there is an opportunity to develop a policy framework that is responsive to existing and new housing challenges that may emerge over the planning horizon. This requires policies that contemplate an appropriate range and mix of housing options and densities to meet projected market-based and affordable housing needs of the regional market area(s).

Housing projections are a key metric to inform County and local planning processes. The County currently uses housing metrics that measure the amount of space required by a unit, such as high or low density. Provincial policies and local housing needs indicate a need for a broader range of housing types and tenures beyond those that are contemplated by the County's in-effect OP. For example, there is a demonstrated need to provide more

housing that addresses the ‘missing middle’, as well as accessible and purpose-built rentals. Housing projections will need to be established through the County’s new OP that are considerate of intensification targets, existing or planned infrastructure, and within the context of providing market choice of housing options.

Recommended Policy Directions

- The County’s in-effect OP establishes specific housing projections for each of the municipalities. Updated policies regarding housing forecasts are therefore required to be consistent with the housing projections over the planning horizon as determined through the GMS.
- Housing policies need to emphasize market choice of housing options and should establish direction with respect to prioritizing where housing growth should occur.
- Policies of the County’s new OP should continue to direct future housing growth to settlement areas where full municipal servicing is available or planned for, as well as locations where there are desirable opportunities for residents to work and play.
- Housing growth is not forecast evenly across the local municipalities, yet there is a demonstrated need within the County to broadly increase the supply and mix of housing across all adult age groups and income levels. As contemplated by the ‘Homes’ discussion paper, there are opportunities through the County’s new OP to establish a more comprehensive policy framework to increase the availability and accessibility of housing within the County.
- The County’s new OP will need to be consistent with the PPS, 2020 direction that municipalities maintain at all times the ability to accommodate residential growth for a minimum of 15 years through residential intensification and redevelopment, and if necessary, lands which are designated and available for residential development.
- The PPS, 2020 also requires planning authorities to maintain land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans.
- A refined policy framework may be developed to provide continued direction to local municipalities to establish OP policies that encourage a range of housing types, densities and options in consideration of the updated housing projections to the year 2046. A refined policy framework should be considerate of ‘Homes’ discussion paper which contemplates a broad range of policy options to increase the supply and mix of homes within the County.
- The existing policy framework established by the Bruce County OP regarding affordable housing may be updated to be consistent the PPS, 2020. This includes an approach that is ‘market-based’ and establishes

minimum targets for housing that is affordable to low- and moderate-income households, as well as establishing a clear definition of affordable that is consistent with the PPS, 2020 and is considerate of the County's definition of the "regional market area".

- Housing growth within the County will need to be predicated on existing or planned servicing capacity. This may require municipalities to coordinate land uses and infrastructure requirements through the phasing and staging of development. This contributes to growth occurring in a coordinated and orderly manner that is consistent with existing or planned servicing and infrastructure within areas of the County that are designated for development.

Promote and Plan for Residential Intensification

Opportunities and Challenges

Residential intensification contributes to building complete communities, makes more efficient use of existing infrastructure and public services, and minimizes adverse impacts to natural heritage and agricultural land. The Province establishes clear policy direction to guide residential intensification, including that sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 25 years.

Further, sufficient land within settlement areas shall be made available through intensification and redevelopment and, if necessary, designated growth areas. On this basis, there is an opportunity for the County's new OP to establish policy direction regarding residential intensification within the local municipalities generally, and the Primary and Secondary Urban Communities more specifically.

Residential intensification supports desirable growth management and planning outcomes. Establishing County-wide intensification targets improves the market choice of housing options (type and tenure), promotes the revitalization of core areas, and generally contributes to the longer-term financial viability of municipal servicing, including water, wastewater, and human services, for example. Intensification can also lead to more complete communities by clustering housing and economic activities to create more equitable opportunities for residents of the County. Establishing residential intensification targets can also lead to less demand for greenfield development, thereby further contributing to the protection of the County's natural heritage and agricultural lands.

Recommended Policy Directions

- The County's new OP establish a minimum County-wide intensification target of 10%.

- For Primary Urban Communities, an annual residential intensification target of 10% to 20% may be established.
- For Secondary Urban Communities, an annual residential intensification target of 0% to 10% may be established. The implementing policy framework may need to contemplate that in some Secondary Urban Communities minimum growth is projected, and no new medium or high-density development is identified.
- Define intensification based on land use density and building typology. For the purpose of implementing the minimum County-wide intensification target of 10%, policies of the County's new OP may define intensification as 'high density' development. On this basis, an overall minimum of 10% of new residential development within the County is required to be 'high density', subject to some flexibility for municipalities to meet the overall intensification target within the Primary Communities and Secondary Communities.
- The Bruce County OP may establish policies that direct local municipalities to develop an intensification strategy that is consistent with the GMS and the County's new OP. The intensification strategies should be implemented through local planning processes, including official plan and zoning by-law review processes.
- Intensification strategies should also be considerate of Provincial policy by contemplating a range of housing options, specifically in regard to providing for an appropriate range and mix of housing options and densities to meet projected market-based and affordable housing needs of current and future residents of the regional market area.
- The GMS identifies projected population and housing growth forecasts to the year 2046. Policies of the County's new OP should provide more specific direction to local municipalities regarding achieving minimum densities to ensure appropriate accommodation of residential growth over the long-term planning horizon. This may include specific housing unit targets as identified by the GMS that require development of a range of housing types and tenures.
- Enabling policies of the County's new OP may establish a framework for municipal intensification strategies to facilitate appropriate intensification and infill through various planning tools, such as: permitting a broader range of housing types that are responsive to market demand; explore opportunities to bring certainty and some flexibility to the development approval process (such as the Community Planning Permit System); the administration of financial incentives to advance the goals and objective of local OPs (such as Community Improvement Plans), as well as other planning tools with similar objectives; and disposing of surplus public land for the purpose of housing, including affordable/attainable housing.
- Intensification and infill within the County that are considerate of the existing character of the settlement areas may be desirable. The development of design guidelines that encourage land use compatibility

between different dwelling types, existing and new community areas, as well as transitioning between lower-, medium- and higher-density built forms will contribute to achieving appropriate intensification and infill developments.

4.3 Non-Residential Recommended Policy Directions

Establish Consistent Employment Area Delineations

Opportunities and Challenges

Section 4.5.2. of the Bruce County OP currently recognizes all industrial lands as Employment Areas. Lands designated as “Business Park” are also defined as Employment Areas. The PPS, 2020 defines Employment Areas as “areas designated in an OP for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices and associated retail and ancillary facilities.” Under the current Bruce County OP, industrial lands that do not accommodate a cluster of business and economic activity are still recognized as Employment Areas.

Recommended Policy Directions

- Establish clear delineation of Employment Areas throughout the County, capturing clusters of business and economic activity.
- Refined Employment Area delineations will allow the County to form a hierarchy of industrial lands, providing a greater ability to plan for non-residential growth.

Continue to Plan for Future Employment Lands Development within Bruce County

Opportunities and Challenges

As identified in **Error! Reference source not found.** (Appendices E and F), the County is anticipated to absorb a total of 158 net ha (390 net acres) of land within its Employment Areas over the next 25 years. While there is a sufficient supply of serviced and/or serviceable land within most of the County’s industrial areas, employment land shortfalls have been identified in the Saugeen Shores Primary Urban Area and Walkerton Primary Urban Area.

Recommended Policy Directions

- Expand the supply of designated Employment Lands within the Saugeen Shores Urban Community by a minimum of 25 gross ha (62 gross acres) and the Walkerton Urban Community by 6 gross ha (15 gross acres) within the next 10+ years.⁴
- In Saugeen Shores and Brockton, the precise delineation of the settlement area boundary expansions may occur through the County's OP Review in consultation with the local municipality, while being consistent with the PPS, 2020 (Policy 1.1.3.8).

Ensure that Employment Lands are Well Adapted to Structural Changes Occurring in the Evolving Macro-Economy

Opportunities and Challenges

Structural changes occurring in the macro economy pose potential challenges and opportunities for future growth on Employment Lands in Bruce County. Given evolving trends in the Southern Ontario economy towards the knowledge-based sector, Bruce County will need to encourage and accommodate a wide range of business service and office uses in Employment Areas where appropriate.

Recommended Policy Directions

- Recognize the importance of employment lands in accommodating knowledge-based sectors in addition to traditional industrial sectors.
- Consider establishing a distinct industrial designation which caters to office and prestige industrial employment uses in a business park setting. Such a designation may be warranted at select gateway locations within one or more of County's urban industrial areas.

⁴ Gross land needs include land requirements associated with local infrastructure and (e.g. local roads, stormwater ponds, utility easements, etc.). Employment Area expansion within Saugeen Shores and Walkerton may also need to consider additional land need adjustments associated with non-developable environmental areas/natural features and/or hazard areas.

Provide Stronger Direction Regarding Employment-Supportive Uses in Employment Areas

Opportunities and Challenges

Recognizing the recent structural change in the economy, there has been a shift in planning philosophy that calls for developing Employment Areas which provide a wider range of employment supportive uses and amenities, generally clustered at strategic locations (i.e. at major intersections, on the fringe of Employment Areas or transition areas). The intention of employment supportive uses in Employment Areas should be to serve the needs of employees within Employment Areas as opposed to the broader population. For this reason, major retail is not recommended in Employment Areas, unless otherwise specified.

Recommended Policy Directions

- Introduce more defined policy direction in the County's and area municipalities' OPs to outline the goals and objectives related to employment-supportive uses in Employment Areas (e.g. non-industrial, non-office uses should be of limited scale, or focused on serving businesses and employees in the Employment Areas). Such uses should minimize potential land-use conflicts and support a viable mix of commercial and industrial land uses.
- Consider the introduction of more defined criteria or descriptions regarding the appropriate type, size and location of complementary non-industrial uses in Employment Areas (e.g. eating establishments, daycares, personal and health care services and smaller-scale, service-oriented businesses) at strategic and accessible locations in existing and future Employment Areas, where appropriate.

Continue to Provide Broader Market Choice on Bruce County Employment Lands

Opportunities and Challenges

While Bruce County has a relatively large supply of designated Employment Lands to accommodate long-term demand in most locations, the County's existing supply of larger vacant employment parcels is limited.

Recommended Policy Directions

- To ensure that the County's employment land supply levels are not unduly constrained, it is recommended that the County continue to strive to provide a minimum designated and serviced supply of at least five years at all times. This should include a range of site selection choices by parcel configuration, designation, zoning and location.

- Local municipalities and the County are encouraged to explore municipal development opportunities for the creation of shovel-ready sites on Employment Lands, subject to a review of development feasibility (i.e. return on investment analysis).
- Consider improving the marketability and feasibility of developing vacant Employment Lands by undertaking necessary pre-screening studies and assessments (e.g. servicing strategies, environmental studies, water protection requirements, archaeological assessment studies, etc.). provincial programs, such as the Investment Ready Certified Site Designation and Rural Economic Development Program (RED) can be utilized by municipalities for that purpose.

Explore Opportunities for Intensification of Employment Lands within Urban Settlement Areas

Opportunities and Challenges

Future redevelopment, expansion and infill opportunities will continue to exist as the County's Employment Areas continue to mature and evolve. Intensification potential on occupied and underutilized Employment Lands is not well understood given uncertainties regarding the future intentions of existing landowners.

Recommended Policy Directions

- Promote and facilitate intensification/infill opportunities in existing Employment Areas.
- Explore opportunities for infill and redevelopment in mature industrial areas.
- Work with landowners of large infill or redevelopment sites to assess interest in developing the lands and assessing feasibility of development.
- Area municipalities and the County are encouraged to explore redevelopment opportunities on brownfield industrial sites.
- Explore public-private partnerships which would encourage intensification and infill development opportunities within Employment Areas.

Protect Employment Lands from Conversion to Non-Employment Uses

Opportunities and Challenges

The conversion of employment lands to non-employment uses negatively impacts Bruce County's economy in several ways:

- It reduces the County's already limited supply of designated Employment Lands;
- It potentially fragments the existing Employment Land supply; and
- It generally impedes the County's potential to accommodate "basic" or export-based job opportunities.

In very specific cases, through a municipal comprehensive review, the conversion of employment lands to non-employment uses may be justified from a land-use planning and economic perspective.

The County OP does not provide direction with respect to how specific industrial sites of interest within Employment Areas (i.e. non-employment development applications) are to be evaluated from a planning and economic standpoint for conversion to a non-employment use.

Recommended Policy Directions

- Develop an approach to evaluating requested conversions on Employment Lands. This evaluation approach should establish criteria which focuses on site-specific factors such as location, site size, configuration, marketability, future expansion potential, etc.

Continue to Recognize Opportunities for Agriculture-related Industrial and Commercial Uses on Agricultural Lands Subject to Local Official Plan Policies

Opportunities and Challenges

The agricultural base represents a significant component of Bruce County's local economy. The agriculture and agri-food system include several industries such as farm input and service supplier industries, primary agriculture, food and beverage processing, food distribution, retail, wholesale and food service industries.

Recommended Policy Directions

- Continue to recognize opportunities for agriculture-related industrial and commercial uses which are permitted in agricultural areas.

Plan for the Vision of the Urban Employment Areas by Mitigating Land-Use Compatibility Conflicts

Opportunities and Challenges

Section 5.2.3.3. of the Bruce County OP discusses Employment Area land-use compatibility within the context of the Bruce Energy Centre Industrial Park. There is no clear definition of permitted land uses within Employment Areas and what constitutes a land-use compatibility issue.

Recommended Policy Directions

- The County should establish policy which details the variety and range of uses which are permitted within Urban Employment Areas.
- Generally, it is recommended that the County encourage employment uses in Urban Employment Areas which require full municipal services and are compatible with the surrounding urban land uses.
- Continue to further mitigate land-use compatibility conflicts as part of the County and local municipal planning approvals process.

Encourage Office Development in Downtowns and Support Smaller-Scale Office Opportunities in Designated Employment Areas

Opportunities and Challenges

Across Canada, the general approach by municipalities has been to direct larger office developments within the downtown core where multi-modal transportation options are the greatest to support live/work opportunities.

Recommended Policy Directions

- Future opportunities for free standing office development should be encouraged and directed to downtown areas.
- Commercial and industrial (e.g. manufacturing, assembly and warehousing) uses with office uses, training facilities and showcase rooms/ancillary retail are increasingly integrated on-site. Operations such as these are typically not appropriate in downtown areas and should be directed towards Employment Areas.

- Further, Employment Areas provide opportunities to accommodate multi-use facilities that downtown areas cannot, such as larger industrial operations adopting a campus-style setting which requires surface parking and future expansion potential.

Conduct a Commercial Land Needs Study that Specifically Addresses the County's Retail Requirements and Commercial Structure

Opportunities and Challenges

Through the GMS exercise, focus has been directed to residential growth within the County's Urban Communities as well as a focus on development within the County's Urban industrial lands. This leaves a gap in the County's understanding of its retail requirements and commercial structure.

Recommended Policy Directions

- To better understand this gap, a commercial land needs study could be undertaken.
- The results of a commercial land needs study would provide the County with sufficient background to plan for a range of non-residential uses.

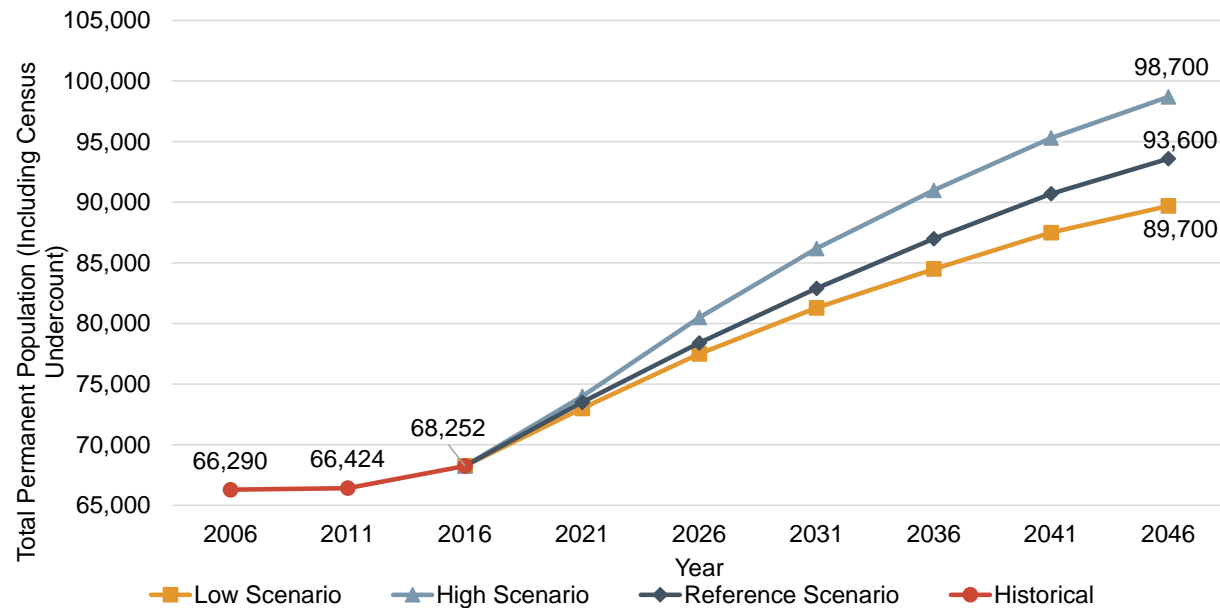
5 Next Steps

This Discussion Paper forms the foundation for developing detailed land use planning policies to responsibly plan for and manage growth within the County over the planning horizon. The process for the new Official Plan will begin soon and will feature additional opportunities for community input.

6 Appendices

Appendix A: Bruce County Population, Housing and Employment Forecast to 2046

Figure A - 1: Long-term Forecast Population Scenarios (Permanent Population), 2016 to 2046



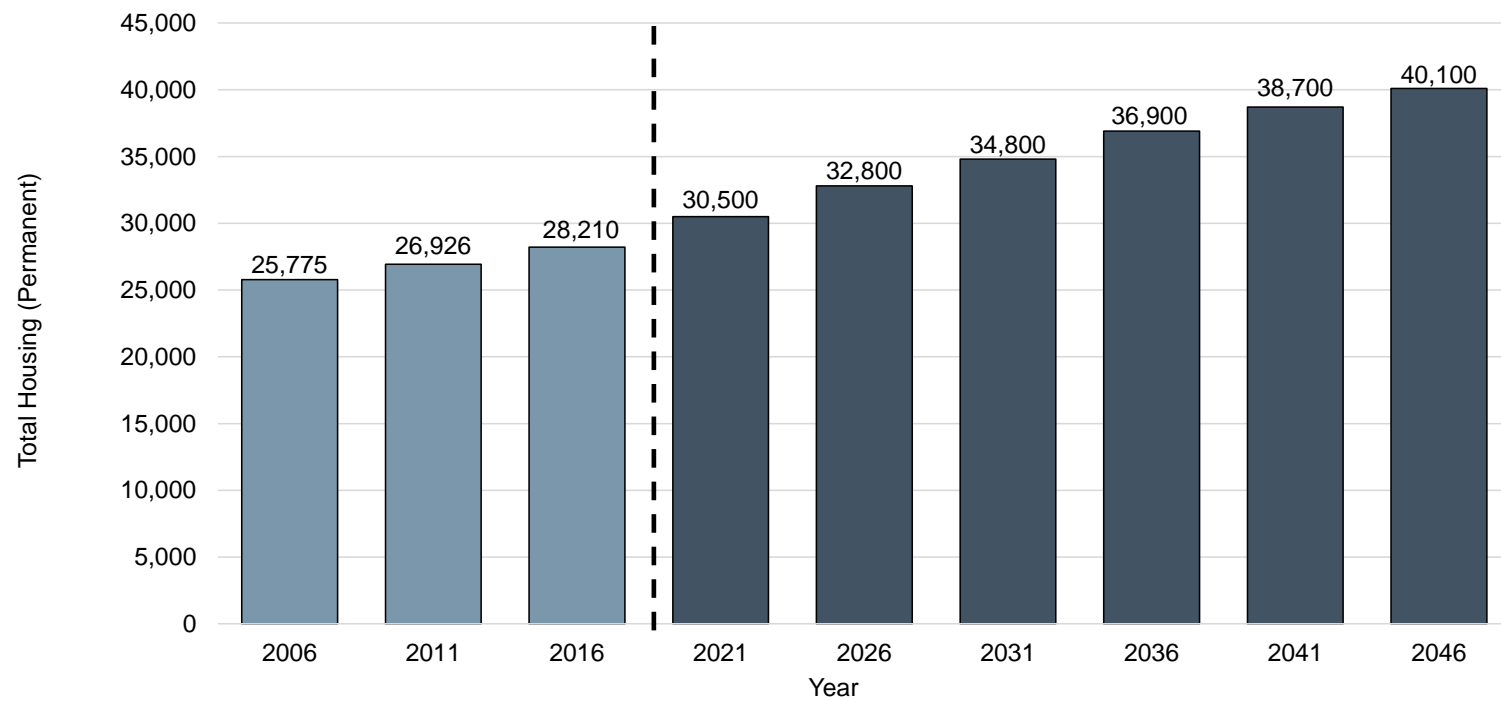
Bruce County Total Permanent Population Growth					
	2016	2046	2016 to 2046	Annual Growth	Annual Growth Rate
High Scenario	68,252	98,700	30,448	1,015	1.24%
Base Case Scenario	68,252	93,600	25,348	845	1.06%
Low Scenario	68,252	89,700	21,448	715	0.92%

Figure A - 2: Bruce County Population Growth Forecast, 2016 to 2046

Year		Population (Including Census undercount)	Population Excluding Census Undercount
Histor- ical	<i>Mid-2006</i>	66,300	64,000
	<i>Mid-2011</i>	66,400	64,700
	<i>Mid-2016</i>	68,300	66,500
Forecast	<i>Mid-2021</i>	73,500	71,600
	<i>Mid-2026</i>	78,400	76,400
	<i>Mid-2031</i>	82,900	80,700
	<i>Mid-2036</i>	87,000	84,800
	<i>Mid-2041</i>	90,700	88,400
	<i>Mid-2046</i>	93,600	91,200
Incremental	Mid-2006 to Mid-2011	100	700
	Mid-2011 to Mid-2016	1,900	1,800
	Mid-2016 to Mid-2021	5,200	5,100
	Mid-2016 to Mid-2026	10,100	9,900
	Mid-2016 to Mid-2031	14,600	14,200
	Mid-2016 to Mid-2036	18,700	18,300
	Mid-2016 to Mid-2041	22,400	21,900
	Mid-2016 to Mid-2046	25,300	24,700

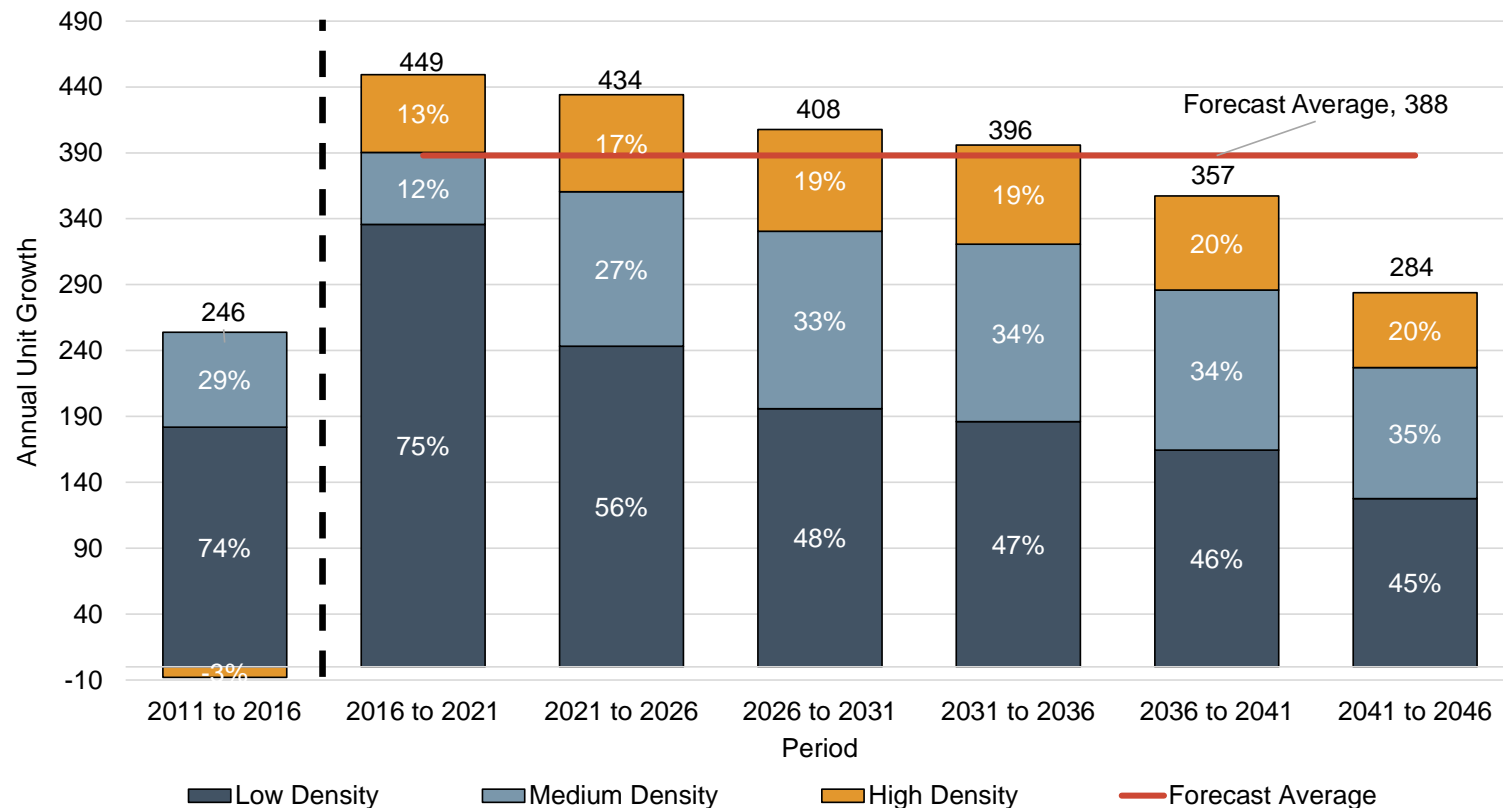
Source: Data from 2006 to 2016 from Statistics Canada Demography Division by Watson & Associates Economists Ltd., 2021.

Figure A - 3: Bruce County, Historical and Forecast Households, 2006 to 2046



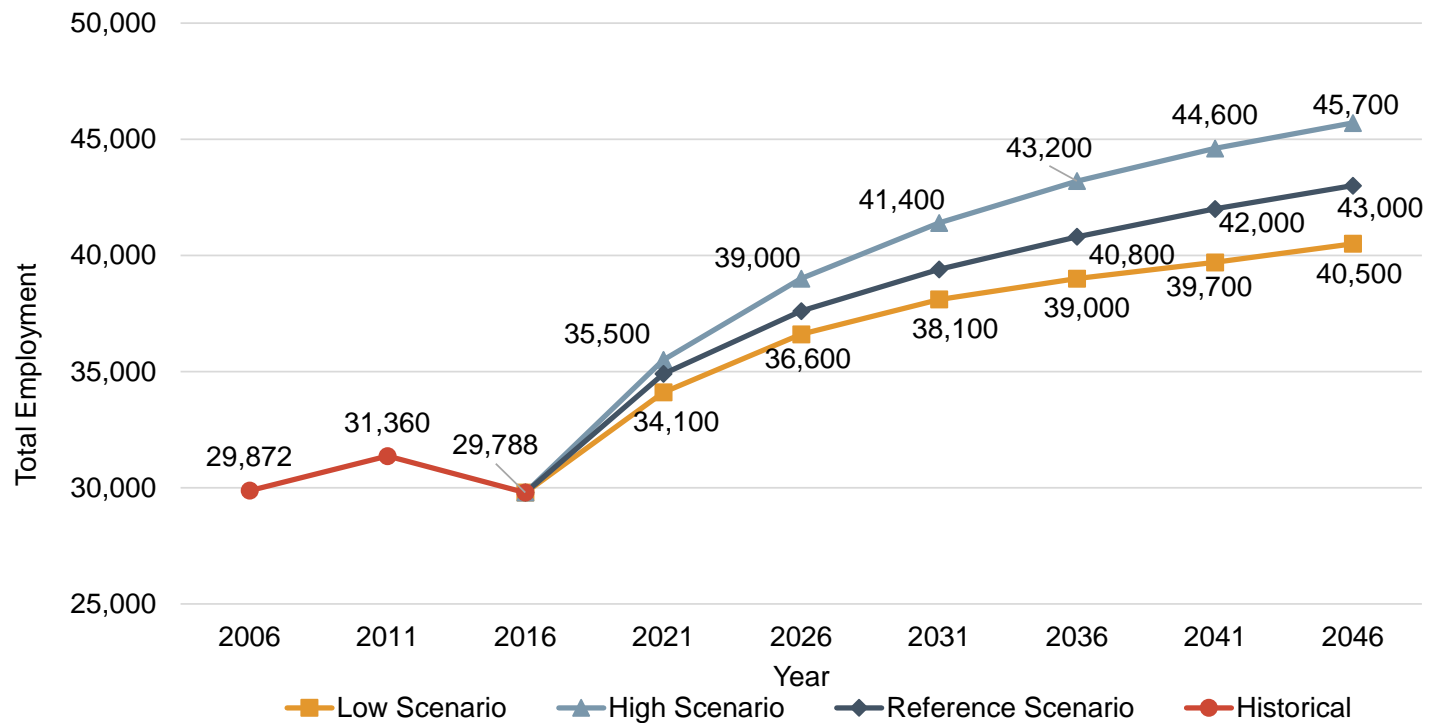
Source: Historical data from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd., 2021.

Figure A - 4: Bruce County, Incremental Historical and Forecast Households by Structure Type (Permanent Households), 2011 to 2046



Source: Historical data from Statistics Canada Census and MPAC. Forecast by Watson & Associates Economists Ltd., 2021.

Figure A - 5: Bruce County, Long-Term Total Employment Forecast Scenarios, 2016 to 2046

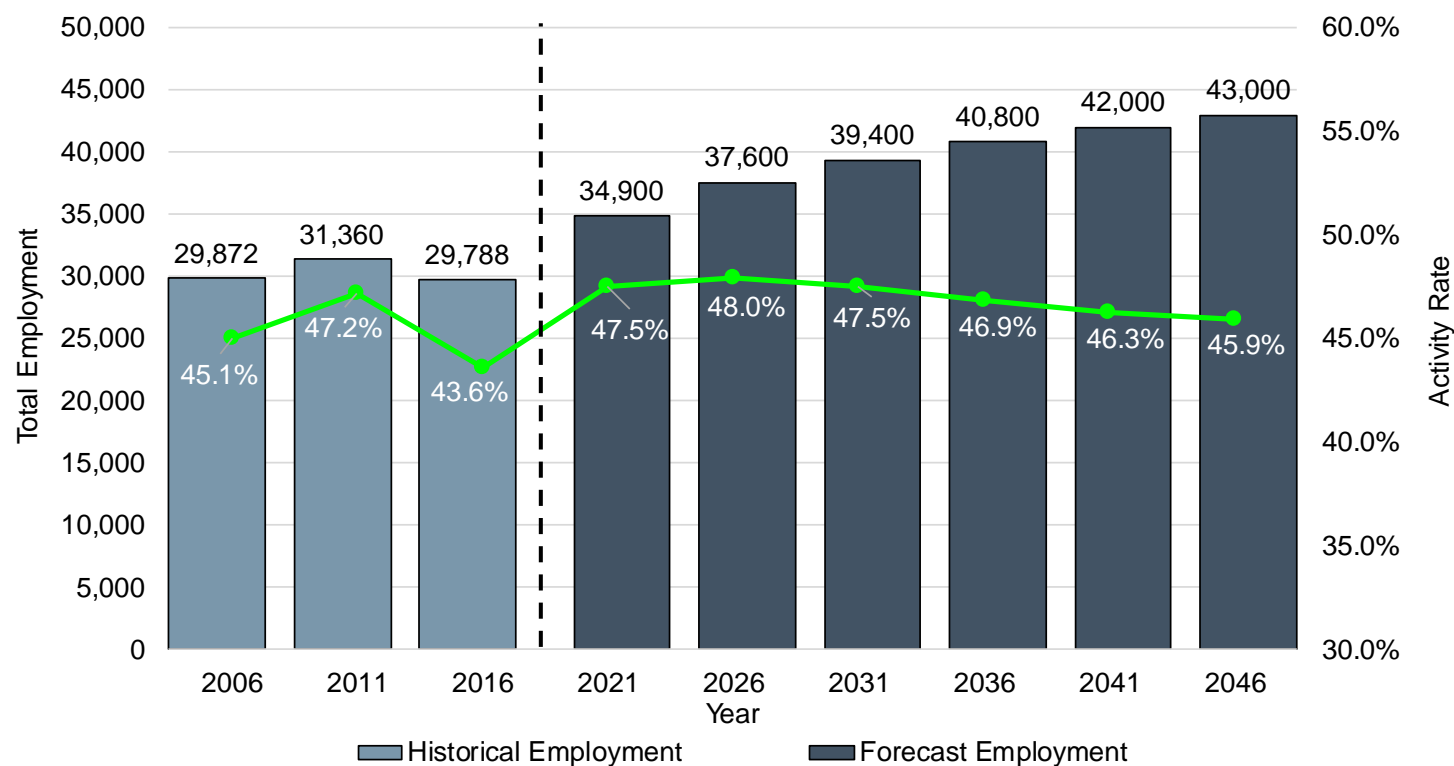


Source: Forecast by Watson & Associates Economists Ltd., 2021.

Note: Total employment includes no fixed place of work and work at home employment.

Bruce County Total Employment Growth					
	2016	2046	2016 to 2046	Annual Growth	Annual Growth Rate
High Scenario	29,800	45,700	15,900	530	1.4%
Base Case Scenario	29,800	43,000	13,200	440	1.2%
Low Scenario	29,800	40,500	10,700	357	1.0%

Figure A - 6: Bruce County, Historical and Forecast Employment Forecast, 2001 to 2046



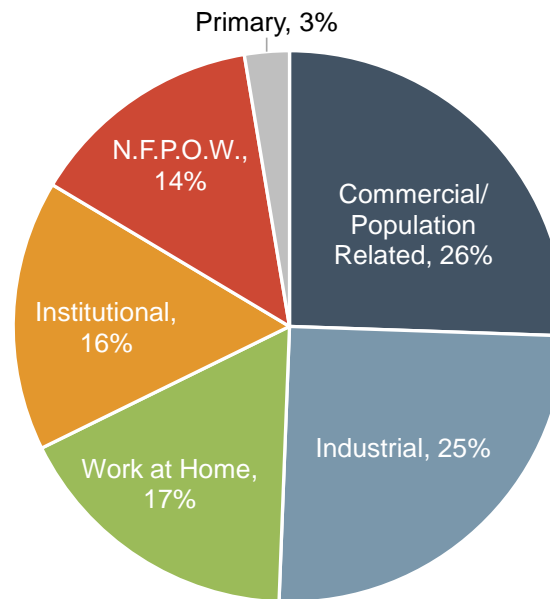
Note: Activity rate is calculated with population including the net Census undercount estimated at 2.65%.

Source: 2001 to 2016 from Statistics Canada place of work data including work at home and no fixed place of work data.

Employment forecast derived by Watson & Associates Economists Ltd., 2021.

Note: Numbers have been rounded

Figure A - 7: Bruce County, Share of Employment Growth by Sector, 2016 to 2046



Source: Forecast by Watson & Associates Economists Ltd., 2021.

Appendix B: Local Municipal Residential and Non-Residential Forecasts, 2016 to 2046

B.1 Municipality of Arran-Elderslie

Figure B - 1: Municipality of Arran-Elderslie Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) ¹	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Total Households	
Historical	Mid-2016	7,000	2,380	115	215	2,710	2.58
Forecast	Mid-2021	7,200	2,470	120	220	2,810	2.56
	Mid-2026	7,500	2,550	140	220	2,910	2.58
	Mid-2031	7,700	2,620	140	220	2,980	2.58
	Mid-2036	7,900	2,710	160	220	3,090	2.56
	Mid-2041	8,100	2,770	170	220	3,160	2.56
	Mid-2046	8,200	2,820	180	220	3,220	2.55
Incremental	Mid-2016 to Mid-2021	200	90	5	5	100	
	Mid-2016 to Mid-2026	500	170	25	5	200	
	Mid-2016 to Mid-2036	900	330	45	5	380	
	Mid-2016 to Mid-2046	1,200	440	65	5	510	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 2: Municipality of Arran-Elderslie Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							Total Employment (Including N.F.P.O.W.)
			Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W. ¹	
2016	7,000	0.297	90	530	310	340	570	1,840	240	2,080
2021	7,200	0.311	80	580	360	360	610	1,990	250	2,240
2026	7,500	0.312	80	600	400	370	630	2,080	260	2,340
2031	7,700	0.313	80	620	410	370	660	2,140	270	2,410
2036	7,900	0.315	80	640	430	380	680	2,210	280	2,490
2041	8,100	0.317	80	660	450	390	710	2,290	280	2,570
2046	8,200	0.316	70	670	450	390	720	2,300	290	2,590
Incremental Change										
2016 - 2021	200	0.0140	-10	50	50	20	40	150	10	160
2016 - 2026	500	0.0149	-10	70	90	30	60	240	20	260
2016 - 2036	900	0.0180	-10	110	120	40	110	370	40	410
2016 - 2046	1,200	0.0187	-20	140	140	50	150	460	50	510

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

B.2 Municipality of Brockton

Figure B - 3: Municipality of Brockton Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) ¹	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Total Households	
Historical	<i>Mid-2016</i>	9,700	3,145	275	390	3,810	2.55
Forecast	<i>Mid-2021</i>	10,000	3,230	300	420	3,950	2.53
	<i>Mid-2026</i>	10,700	3,410	360	500	4,270	2.51
	<i>Mid-2031</i>	11,500	3,580	460	600	4,640	2.48
	<i>Mid-2036</i>	12,200	3,700	580	690	4,970	2.45
	<i>Mid-2041</i>	12,800	3,800	710	770	5,280	2.42
	<i>Mid-2046</i>	13,200	3,880	810	830	5,520	2.39
Incremental	Mid-2016 to Mid-2021	300	85	25	30	140	
	Mid-2016 to Mid-2026	1,000	265	85	110	460	
	Mid-2016 to Mid-2036	2,500	555	305	300	1,160	
	Mid-2016 to Mid-2046	3,500	735	535	440	1,710	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 4: Municipality of Brockton Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							Total Employment (Including N.F.P.O.W.)
			Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W. ¹	
2016	9,700	0.456	140	540	990	1,110	1,050	3,830	590	4,420
2021	10,000	0.467	150	610	1,070	1,140	1,080	4,050	620	4,670
2026	10,700	0.470	160	670	1,120	1,240	1,160	4,350	680	5,030
2031	11,500	0.465	180	710	1,160	1,320	1,250	4,620	730	5,350
2036	12,200	0.463	200	760	1,190	1,400	1,330	4,880	770	5,650
2041	12,800	0.462	210	810	1,210	1,480	1,390	5,100	810	5,910
2046	13,200	0.461	230	830	1,230	1,530	1,440	5,260	830	6,090
Incremental Change										
2016 - 2021	300	0.0113	10	70	80	30	30	220	30	250
2016 - 2026	1,000	0.0144	20	130	130	130	110	520	90	610
2016 - 2036	2,500	0.0074	60	220	200	290	280	1,050	180	1,230
2016 - 2046	3,500	0.0057	90	290	240	420	390	1,430	240	1,670

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

B.3 Township of Huron-Kinloss

Figure B - 5: Township of Huron-Kinloss Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) ¹	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Total Households	
Historical	Mid-2016	7,300	2,550	45	170	2,765	2.64
Forecast	Mid-2020	7,841	2,758	49	170	2,977	2.63
	Mid-2021	8,000	2,810	50	170	3,030	2.64
	Mid-2026	8,700	3,050	60	170	3,280	2.65
	Mid-2031	9,200	3,210	70	180	3,460	2.66
	Mid-2036	9,800	3,400	90	190	3,680	2.66
	Mid-2041	10,300	3,570	90	210	3,870	2.66
	Mid-2046	10,600	3,690	100	220	4,010	2.64
Incremental	Mid-2011 to Mid-2016	300	169	-32	45	182	
	Mid-2016 to Mid-2021	700	260	5	0	265	
	Mid-2016 to Mid-2026	1,400	500	15	0	515	
	Mid-2016 to Mid-2031	1,900	660	25	10	695	
	Mid-2016 to Mid-2036	2,500	850	45	20	915	
	Mid-2016 to Mid-2041	3,000	1,020	45	40	1,105	
	Mid-2016 to Mid-2046	3,300	1,140	55	50	1,245	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 6: Township of Huron-Kinloss Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							Total Employment (Including N.F.P.O.W.)
			Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W. ¹	
2016	7,300	0.274	120	720	260	310	340	1,750	250	2,000
2021	8,000	0.285	130	860	290	340	360	1,980	300	2,280
2026	8,700	0.285	140	940	310	370	380	2,140	340	2,480
2031	9,200	0.285	150	990	330	380	390	2,240	380	2,620
2036	9,800	0.283	160	1,050	350	390	410	2,360	410	2,770
2041	10,300	0.281	160	1,120	360	400	420	2,460	430	2,890
2046	10,600	0.283	170	1,160	370	410	430	2,540	460	3,000
Incremental Change										
2016 - 2021	700	0.0110	10	140	30	30	20	230	50	280
2016 - 2026	1,400	0.0111	20	220	50	60	40	390	90	480
2016 - 2036	2,500	0.0087	40	330	90	80	70	610	160	770
2016 - 2046	3,300	0.0090	50	440	110	100	90	790	210	1,000

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

B.4 Municipality of Kincardine

Figure B - 7: Municipality of Kincardine Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) ¹	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Total Households	
Historical	Mid-2016	11,700	4,080	385	345	4,810	2.43
Forecast	Mid-2020	12,230	4,232	421	397	5,050	2.42
	Mid-2021	12,300	4,270	430	410	5,110	2.41
	Mid-2026	13,100	4,450	510	490	5,450	2.40
	Mid-2031	13,700	4,540	610	580	5,730	2.39
	Mid-2036	14,400	4,680	720	660	6,060	2.38
	Mid-2041	14,900	4,790	820	750	6,360	2.34
	Mid-2046	15,400	4,870	900	820	6,590	2.34
Incremental	Mid-2011 to Mid-2016	200	75	100	-5	170	
	Mid-2016 to Mid-2021	600	190	45	65	300	
	Mid-2016 to Mid-2026	1,400	370	125	145	640	
	Mid-2016 to Mid-2031	2,000	460	225	235	920	
	Mid-2016 to Mid-2036	2,700	600	335	315	1,250	
	Mid-2016 to Mid-2041	3,200	710	435	405	1,550	
	Mid-2016 to Mid-2046	3,700	790	515	475	1,780	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 8: Municipality of Kincardine Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							Total Employment (Including N.F.P.O.W.)
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ¹	
2016	11,700	0.957	110	580	6,470	2,100	920	10,180	1,020	11,200
2021	12,300	1.127	120	740	8,590	2,280	1,030	12,760	1,100	13,860
2026	13,100	1.141	140	790	9,310	2,420	1,110	13,770	1,180	14,950
2031	13,700	1.124	160	820	9,470	2,530	1,180	14,160	1,240	15,400
2036	14,400	1.078	170	860	9,260	2,670	1,260	14,220	1,300	15,520
2041	14,900	1.047	180	910	9,010	2,800	1,340	14,240	1,360	15,600
2046	15,400	1.019	180	940	8,890	2,880	1,400	14,290	1,410	15,700
Incremental Change										
2016 - 2021	600	0.1696	10	160	2,120	180	110	2,580	80	2,660
2016 - 2026	1,400	0.1840	30	210	2,840	320	190	3,590	160	3,750
2016 - 2036	2,700	0.1205	60	280	2,790	570	340	4,040	280	4,320
2016 - 2046	3,700	0.0622	70	360	2,420	780	480	4,110	390	4,500

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

B.5 Municipality of Northern Bruce Peninsula

Figure B - 9: Municipality of Northern Bruce Peninsula Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) ¹	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Total Households	
Historical	Mid-2016	4,100	1,835	40	30	1,905	2.15
Forecast	Mid-2021	4,600	2,030	40	30	2,100	2.19
	Mid-2026	5,000	2,190	40	30	2,260	2.21
	Mid-2031	5,300	2,280	40	30	2,350	2.26
	Mid-2036	5,600	2,410	40	30	2,480	2.26
	Mid-2041	5,900	2,510	40	30	2,580	2.29
	Mid-2046	6,100	2,580	40	30	2,650	2.30
Incremental	Mid-2016 to Mid-2021	500	195	0	0	195	
	Mid-2016 to Mid-2026	900	355	0	0	355	
	Mid-2016 to Mid-2036	1,500	575	0	0	575	
	Mid-2016 to Mid-2046	2,000	745	0	0	745	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 10: Municipality of Northern Bruce Peninsula Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							Total Employment (Including N.F.P.O.W.)
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ¹	
2016	4,100	0.322	40	300	170	410	220	1,140	180	1,320
2021	4,600	0.341	40	370	190	480	260	1,340	230	1,570
2026	5,000	0.338	40	400	200	520	280	1,440	250	1,690
2031	5,300	0.336	40	420	210	540	300	1,510	270	1,780
2036	5,600	0.336	40	450	220	570	320	1,600	280	1,880
2041	5,900	0.336	40	480	220	600	340	1,680	300	1,980
2046	6,100	0.334	40	490	230	620	350	1,730	310	2,040
Incremental Change										
2016 - 2021	500	0.0194	0	70	20	70	40	200	50	250
2016 - 2026	900	0.0160	0	100	30	110	60	300	70	370
2016 - 2036	1,500	0.0138	0	150	50	160	100	460	100	560
2016 - 2046	2,000	0.0125	0	190	60	210	130	590	130	720

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

B.6 Town of Saugeen Shores

Figure B - 11: Town of Saugeen Shores Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) ¹	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Total Households	
Historical	<i>Mid-2016</i>	14,100	4,940	400	605	5,945	2.37
Forecast	<i>Mid-2021</i>	16,400	5,570	560	810	6,940	2.36
	<i>Mid-2026</i>	17,600	5,710	940	1,010	7,660	2.30
	<i>Mid-2031</i>	19,200	5,950	1,340	1,210	8,500	2.26
	<i>Mid-2036</i>	20,300	6,010	1,680	1,400	9,090	2.23
	<i>Mid-2041</i>	21,200	6,100	1,980	1,570	9,650	2.20
	<i>Mid-2046</i>	22,200	6,220	2,240	1,720	10,180	2.18
Incremental	Mid-2016 to Mid-2021	2,300	630	160	205	995	
	Mid-2016 to Mid-2026	3,500	770	540	405	1,715	
	Mid-2016 to Mid-2036	6,200	1,070	1,280	795	3,145	
	Mid-2016 to Mid-2046	8,100	1,280	1,840	1,115	4,235	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 12: Town of Saugeen Shores Employment Forecast, 2016 to 2046

Period	Population	Activity Rate	Employment							
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ¹	Total Employment (Including N.F.P.O.W.)
2016	14,100	0.302	20	340	410	2,190	870	3,830	430	4,260
2021	16,400	0.321	20	490	520	2,660	1,050	4,740	530	5,270
2026	17,600	0.323	20	530	560	2,860	1,130	5,100	580	5,680
2031	19,200	0.323	20	600	580	3,120	1,240	5,560	650	6,210
2036	20,300	0.324	20	630	600	3,290	1,310	5,850	720	6,570
2041	21,200	0.327	20	690	630	3,450	1,380	6,170	770	6,940
2046	22,200	0.327	20	730	640	3,600	1,460	6,450	820	7,270
Incremental Change										
2016 - 2021	2,300	0.0192	0	150	110	470	180	910	100	1,010
2016 - 2026	3,500	0.0206	0	190	150	670	260	1,270	150	1,420
2016 - 2036	6,200	0.0215	0	290	190	1,100	440	2,020	290	2,310
2016 - 2046	8,100	0.0253	0	390	230	1,410	590	2,620	390	3,010

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

B.7 Municipality of South Bruce

Figure B - 13: Municipality of South Bruce Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) ¹	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Total Households	
Historical	<i>Mid-2016</i>	5,800	1,955	75	140	2,170	2.67
Forecast	<i>Mid-2021</i>	6,000	2,030	80	140	2,250	2.67
	<i>Mid-2026</i>	6,300	2,140	90	140	2,370	2.66
	<i>Mid-2031</i>	6,600	2,240	100	140	2,480	2.66
	<i>Mid-2036</i>	6,900	2,350	120	140	2,610	2.64
	<i>Mid-2041</i>	7,200	2,450	130	140	2,720	2.65
	<i>Mid-2046</i>	7,400	2,510	140	140	2,790	2.65
Incremental	Mid-2016 to Mid-2021	200	75	5	0	80	
	Mid-2016 to Mid-2026	500	185	15	0	200	
	Mid-2016 to Mid-2036	1,100	395	45	0	440	
	Mid-2016 to Mid-2046	1,600	555	65	0	620	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 14: Municipality of South Bruce Population and Housing Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							Total Employment (Including N.F.P.O.W.)
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ¹	
2016	5,800	0.302	180	580	340	300	140	1,540	210	1,750
2021	6,000	0.317	200	640	370	320	140	1,670	230	1,900
2026	6,300	0.330	220	690	370	340	150	1,770	310	2,080
2031	6,600	0.329	230	720	380	350	160	1,840	330	2,170
2036	6,900	0.330	250	750	400	370	160	1,930	350	2,280
2041	7,200	0.331	260	790	410	390	170	2,020	360	2,380
2046	7,400	0.331	270	810	410	400	180	2,070	380	2,450
Incremental Change										
2016 - 2021	200	0.0149	20	60	30	20	0	130	20	150
2016 - 2026	500	0.0284	40	110	30	40	10	230	100	330
2016 - 2036	1,100	0.0287	70	170	60	70	20	390	140	530
2016 - 2046	1,600	0.0294	90	230	70	100	40	530	170	700

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

B.8 Town of South Bruce Peninsula

Figure B - 15: Town of South Bruce Peninsula Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) ¹	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Total Households	
Historical	<i>Mid-2016</i>	8,600	3,325	130	245	3,700	2.32
Forecast	<i>Mid-2021</i>	9,000	3,480	160	250	3,890	2.31
	<i>Mid-2026</i>	9,400	3,600	190	250	4,040	2.33
	<i>Mid-2031</i>	9,700	3,670	230	250	4,150	2.34
	<i>Mid-2036</i>	10,000	3,760	290	250	4,300	2.33
	<i>Mid-2041</i>	10,300	3,840	340	250	4,430	2.33
	<i>Mid-2046</i>	10,500	3,900	370	250	4,520	2.32
Incremental	Mid-2016 to Mid-2021	400	155	30	5	190	
	Mid-2016 to Mid-2026	800	275	60	5	340	
	Mid-2016 to Mid-2036	1,400	435	160	5	600	
	Mid-2016 to Mid-2046	1,900	575	240	5	820	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 16: Town of South Bruce Peninsula Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							Total Employment (Including N.F.P.O.W.)
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ¹	
2016	8,600	0.331	220	480	210	1,050	590	2,550	300	2,850
2021	9,000	0.349	230	550	210	1,130	670	2,790	350	3,140
2026	9,400	0.359	240	580	220	1,170	700	2,910	460	3,370
2031	9,700	0.360	240	600	220	1,210	730	3,000	490	3,490
2036	10,000	0.361	250	620	230	1,260	750	3,110	500	3,610
2041	10,300	0.364	260	650	230	1,310	770	3,220	530	3,750
2046	10,500	0.366	260	670	240	1,330	800	3,300	540	3,840
Incremental Change										
2016 - 2021	5,926	0.0175	10	70	0	80	80	240	50	290
2016 - 2026	5,961	0.0271	20	100	10	120	110	360	160	520
2016 - 2036	6,601	0.0296	30	140	20	210	160	560	200	760
2016 - 2046	7,207	0.0343	40	190	30	280	210	750	240	990

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

¹ Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

Appendix C: Local Municipal Population and Housing Growth Forecast by Primary and Secondary Urban Communities, 2016 to 2046

Figure C - 1: Bruce County

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Urban Areas	2016 to 2021	1,460	270	300	2,030	40	2,070	90	2,160	4,930	-430	4,500	320	4,820
	2016 to 2026	2,490	860	660	4,020	70	4,090	200	4,280	8,950	-370	8,580	710	9,280
	2016 to 2031	3,350	1,530	1,050	5,930	100	6,030	290	6,320	12,880	-370	12,510	1,020	13,530
	2016 to 2036	4,130	2,210	1,430	7,770	120	7,890	380	8,260	16,600	-480	16,120	1,340	17,470
	2016 to 2041	4,820	2,810	1,790	9,420	150	9,570	450	10,020	19,940	-630	19,310	1,620	20,930
	2016 to 2046	5,370	3,310	2,070	10,750	170	10,920	510	11,430	22,610	-810	21,790	1,840	23,630
Remaining Rural Areas	2016 to 2021	220	0	0	220	30	250	230	480	590	-110	470	830	1,300
	2016 to 2026	400	0	0	400	50	450	550	1,010	1,060	-100	960	1,980	2,940
	2016 to 2031	520	0	0	520	70	590	750	1,340	1,380	-100	1,280	2,680	3,960
	2016 to 2036	670	0	0	670	90	760	1,010	1,770	1,770	-130	1,640	3,620	5,260
	2016 to 2041	800	0	0	800	100	900	1,230	2,140	2,110	-170	1,940	4,410	6,360
	2016 to 2046	890	0	0	890	120	1,010	1,390	2,410	2,360	-210	2,140	4,990	7,130
Bruce County Total	2016 to 2021	1,680	270	300	2,250	70	2,320	320	2,640	5,520	-550	4,970	1,150	6,120
	2016 to 2026	2,890	860	660	4,420	120	4,540	750	5,290	10,010	-470	9,540	2,680	12,220
	2016 to 2031	3,870	1,530	1,050	6,460	170	6,620	1,030	7,660	14,260	-470	13,790	3,700	17,490
	2016 to 2036	4,800	2,210	1,430	8,440	210	8,650	1,390	10,030	18,360	-600	17,760	4,960	22,720
	2016 to 2041	5,630	2,810	1,790	10,220	250	10,470	1,690	12,160	22,050	-790	21,260	6,030	27,290
	2016 to 2046	6,260	3,310	2,070	11,640	290	11,930	1,910	13,840	24,960	-1,030	23,940	6,830	30,760

Source: Forecast by Watson & Associates Economists Ltd., 2020.

¹ Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 2: Municipality of Arran-Elderslie

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Allenford (S.U.A.)	2016 to 2021	2	0	0	2	0	2	0	2	5	0	4	0	4
	2016 to 2026	5	0	0	5	0	5	0	5	10	0	10	0	10
	2016 to 2031	7	0	0	7	0	7	0	7	20	0	20	0	20
	2016 to 2036	9	0	0	9	0	9	0	9	20	0	20	0	20
	2016 to 2041	10	0	0	10	0	10	0	10	30	0	20	0	20
Paisley (P.U.A.)	2016 to 2046	10	0	0	10	0	10	0	10	30	0	30	0	30
	2016 to 2021	8	0	0	8	0	8	0	8	20	-10	10	0	10
	2016 to 2026	20	0	0	20	0	20	0	20	40	-10	30	0	30
	2016 to 2031	20	0	0	20	0	20	0	20	60	-10	50	0	50
	2016 to 2036	30	0	0	30	0	30	0	30	70	-10	60	0	60
Chesley (P.U.A.)	2016 to 2041	30	0	0	30	0	30	0	30	90	-10	70	0	70
	2016 to 2046	40	0	0	40	0	40	0	40	100	-20	80	0	80
	2016 to 2021	40	1	0	40	0	40	1	40	110	-10	90	3	100
	2016 to 2026	80	3	0	80	0	80	1	80	210	-10	200	4	200
	2016 to 2031	110	4	0	110	0	110	2	110	290	-10	280	7	290
Tara (P.U.A.)	2016 to 2036	150	6	0	150	0	150	2	150	390	-20	380	7	380
	2016 to 2041	170	9	0	180	0	180	3	180	470	-20	450	10	460
	2016 to 2046	190	10	0	200	0	200	3	200	510	-30	490	10	500
	2016 to 2021	20	5	0	30	0	30	0	30	60	-10	50	0	50
	2016 to 2026	40	20	0	60	0	60	0	60	130	-10	120	0	120
Urban Areas	2016 to 2031	50	30	0	80	0	80	0	80	180	-10	180	0	180
	2016 to 2036	70	40	0	110	0	110	0	110	250	-10	240	0	240
	2016 to 2041	90	50	0	140	0	140	0	140	310	-10	300	0	300
	2016 to 2046	100	60	0	150	0	150	0	150	350	-20	330	0	330
	2016 to 2021	70	6	0	80	0	80	1	80	200	-30	160	3	170
Remaining Rural Areas	2016 to 2026	140	20	0	160	0	160	1	160	390	-30	360	4	370
	2016 to 2031	190	30	0	220	0	220	2	220	550	-30	520	7	530
	2016 to 2036	260	40	0	300	0	300	2	300	740	-40	700	7	710
	2016 to 2041	300	60	0	360	0	360	3	360	890	-50	840	10	850
	2016 to 2046	330	70	0	400	0	400	3	400	980	-70	920	10	930
Municipality of Arran-Elderslie Total	2016 to 2021	20	0	0	20	7	20	1	30	50	-20	20	4	30
	2016 to 2026	30	0	0	30	10	50	2	50	90	-20	70	7	80
	2016 to 2031	50	0	0	50	20	60	2	70	130	-20	110	7	120
	2016 to 2036	70	0	0	70	20	90	3	90	180	-20	160	10	170
	2016 to 2041	90	0	0	90	20	110	3	120	240	-30	210	10	220
Municipality of Arran-Elderslie Total	2016 to 2046	110	0	0	110	30	130	4	140	280	-40	240	10	260
	2016 to 2021	90	6	0	90	7	100	2	100	240	-60	190	7	190
	2016 to 2026	170	20	0	190	10	200	3	200	480	-50	430	10	440
	2016 to 2031	240	30	0	270	20	280	4	290	670	-50	630	10	640
	2016 to 2036	330	40	0	370	20	390	5	390	920	-60	860	20	880
Municipality of Arran-Elderslie Total	2016 to 2041	390	60	0	450	20	470	6	480	1,130	-80	1,050	20	1,070
	2016 to 2046	440	70	0	510	30	530	7	540	1,260	-110	1,160	30	1,180

Source: Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 3: Municipality of Brockton

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Elmwood (S.U.A.)	2016 to 2021	4	0	0	4	0	4	0	4	10	0	8	0	8
	2016 to 2026	10	0	0	10	0	10	0	10	30	0	30	0	30
	2016 to 2031	20	0	0	20	0	20	0	20	50	0	50	0	50
	2016 to 2036	30	0	0	30	0	30	0	30	70	0	70	0	70
	2016 to 2041	40	0	0	40	0	40	0	40	90	0	90	0	80
Walkerton (P.U.A.)	2016 to 2021	80	30	30	130	0	130	0	130	110	-10	100	0	100
	2016 to 2026	240	90	110	440	0	440	0	440	300	-70	240	0	240
	2016 to 2031	390	180	210	780	0	780	0	780	940	-60	890	0	890
	2016 to 2036	490	300	300	1,090	0	1,090	0	1,090	1,630	-60	1,570	0	1,570
	2016 to 2041	570	440	380	1,390	0	1,390	0	1,390	2,230	-70	2,160	0	2,160
Urban Areas	2016 to 2021	80	30	30	140	0	140	0	140	2,780	-90	2,690	0	2,690
	2016 to 2026	250	90	110	450	0	450	0	450	3,180	-120	3,060	0	3,060
	2016 to 2031	410	180	210	800	0	800	0	800	310	-70	250	0	250
	2016 to 2036	520	300	300	1,120	0	1,120	0	1,120	980	-60	920	0	920
	2016 to 2041	610	440	380	1,420	0	1,420	0	1,420	1,680	-60	1,620	0	1,620
Remaining Rural Areas	2016 to 2021	6	0	0	6	10	20	0	20	2,300	-70	2,230	0	2,230
	2016 to 2026	20	0	0	20	20	30	0	30	2,870	-100	2,770	0	2,770
	2016 to 2031	30	0	0	30	20	50	0	50	3,290	-130	3,160	0	3,160
	2016 to 2036	40	0	0	40	30	70	0	70	20	-10	6	0	6
	2016 to 2041	50	0	0	50	40	90	0	90	40	-10	30	0	30
Municipality of Brockton Total	2016 to 2021	90	30	30	140	10	150	0	150	70	-10	60	0	60
	2016 to 2026	270	90	110	470	20	490	0	490	100	-10	90	0	90
	2016 to 2031	440	180	210	820	20	850	0	850	140	-20	130	0	120
	2016 to 2036	560	300	300	1,160	30	1,190	0	1,190	170	-20	160	0	150
	2016 to 2041	660	440	380	1,480	40	1,510	0	1,510	330	-80	250	0	250
	2016 to 2046	740	530	440	1,710	40	1,750	0	1,750	1,020	-70	950	0	950
										1,750	-70	1,680	0	1,680
										2,400	-90	2,320	0	2,310
										3,010	-110	2,900	-10	2,890
										3,460	-150	3,320	-10	3,310

Source: Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 4: Township of Huron-Kinloss

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Huron-Kinloss Shoreline (S.U.A.)	2016 to 2021	150	5	0	160	20	180	20	190	420	-30	390	50	440
	2016 to 2026	280	10	2	300	40	330	30	370	760	-30	730	120	850
	2016 to 2031	350	20	5	380	50	430	50	470	960	-30	930	170	1,100
	2016 to 2036	430	40	20	490	60	560	60	620	1,230	-40	1,190	230	1,420
	2016 to 2041	490	50	40	580	80	650	80	730	1,420	-50	1,370	280	1,660
	2016 to 2046	520	60	50	620	90	710	90	800	1,520	-60	1,460	320	1,780
Lucknow (P.U.A.)	2016 to 2021	40	0	0	40	0	40	0	40	90	-10	80	0	80
	2016 to 2026	70	0	0	70	0	70	0	70	190	-10	180	0	180
	2016 to 2031	100	0	0	100	0	100	0	100	270	-10	260	0	260
	2016 to 2036	140	0	0	140	0	140	0	140	370	-10	360	0	360
	2016 to 2041	180	0	0	180	0	180	0	180	480	-20	460	0	460
	2016 to 2046	220	0	0	220	0	220	0	220	570	-20	550	0	550
Ripley (P.U.A.)	2016 to 2021	60	0	0	60	0	60	0	60	170	-10	160	0	160
	2016 to 2026	130	0	0	130	0	130	0	130	330	-10	320	0	320
	2016 to 2031	170	0	0	170	0	170	0	170	450	-10	450	0	450
	2016 to 2036	230	0	0	230	0	230	0	230	610	-10	600	0	600
	2016 to 2041	290	0	0	290	0	290	0	290	750	-10	750	0	750
	2016 to 2046	330	0	0	330	0	330	0	330	880	-10	870	0	870
Urban Areas	2016 to 2021	250	5	0	260	20	280	20	290	680	-50	630	50	690
	2016 to 2026	480	10	2	490	40	530	30	560	1,280	-40	1,240	120	1,360
	2016 to 2031	620	20	5	650	50	700	50	750	1,680	-40	1,630	170	1,800
	2016 to 2036	800	40	20	870	60	930	60	990	2,210	-60	2,160	230	2,390
	2016 to 2041	960	50	40	1,040	80	1,120	80	1,200	2,650	-70	2,580	280	2,860
	2016 to 2046	1,070	60	50	1,170	90	1,260	90	1,350	2,970	-100	2,870	320	3,190
Remaining Rural Areas	2016 to 2021	10	0	0	10	0	10	0	10	40	-10	30	0	30
	2016 to 2026	30	0	0	30	0	30	0	30	70	-10	60	0	60
	2016 to 2031	40	0	0	40	0	40	0	40	100	-10	90	0	90
	2016 to 2036	50	0	0	50	0	50	0	50	120	-10	110	0	110
	2016 to 2041	60	0	0	60	0	60	0	60	160	-10	150	0	150
	2016 to 2046	70	0	0	70	0	70	0	70	180	-20	160	0	160
Township of Huron-Kinloss Total	2016 to 2021	260	5	0	270	20	290	20	300	720	-60	660	50	710
	2016 to 2026	500	10	2	520	40	550	30	590	1,350	-50	1,300	120	1,420
	2016 to 2031	660	20	5	680	50	730	50	780	1,770	-50	1,720	170	1,890
	2016 to 2036	850	40	20	910	60	980	60	1,040	2,330	-60	2,270	230	2,500
	2016 to 2041	1,020	50	40	1,100	80	1,180	80	1,260	2,810	-80	2,730	280	3,010
	2016 to 2046	1,140	60	50	1,240	90	1,330	90	1,420	3,150	-110	3,040	320	3,360

Source: Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 5: Municipality of Kincardine

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Kincardine (P.U.A.)	2016 to 2021	120	40	60	220	2	220	0	220	500	-70	430	0	430
	2016 to 2026	220	120	140	490	5	490	1	490	1,000	-60	940	4	940
	2016 to 2031	270	230	230	730	6	740	1	740	1,430	-60	1,370	4	1,370
	2016 to 2036	350	340	310	1,000	7	1,000	1	1,000	1,930	-70	1,860	4	1,860
	2016 to 2041	400	430	400	1,240	8	1,240	2	1,250	2,360	-100	2,260	7	2,270
	2016 to 2046	440	510	470	1,420	9	1,420	2	1,430	2,680	-130	2,550	7	2,560
Kincardine Urban Partial Services (S.U.A.)	2016 to 2021	40	0	0	40	9	50	2	60	120	-10	110	8	120
	2016 to 2026	80	0	0	80	20	100	4	100	220	-10	210	10	220
	2016 to 2031	100	0	0	100	20	120	6	130	260	-10	250	20	270
	2016 to 2036	120	0	0	120	30	150	8	160	330	-10	310	30	340
	2016 to 2041	140	0	0	140	30	170	8	180	370	-20	360	30	390
	2016 to 2046	150	0	0	150	40	190	10	200	400	-20	380	40	420
Tiverton (P.U.A.)	2016 to 2021	20	0	0	20	0	20	0	20	50	-10	40	0	40
	2016 to 2026	40	0	0	40	0	40	0	40	110	-10	100	0	100
	2016 to 2031	50	0	0	50	0	50	0	50	140	-10	140	0	140
	2016 to 2036	80	0	0	80	0	80	0	80	200	-10	200	0	200
	2016 to 2041	100	0	0	100	0	100	1	100	260	-10	250	4	250
	2016 to 2046	120	0	0	120	0	120	0	120	310	-10	290	0	290
Urban Areas	2016 to 2021	180	40	60	280	10	290	2	300	660	-80	580	8	590
	2016 to 2026	350	120	140	610	20	630	5	640	1,330	-70	1,250	20	1,270
	2016 to 2031	420	230	230	880	30	910	7	920	1,830	-70	1,760	30	1,780
	2016 to 2036	550	340	310	1,200	30	1,230	9	1,240	2,460	-90	2,360	30	2,400
	2016 to 2041	640	430	400	1,470	40	1,510	10	1,520	2,990	-120	2,860	40	2,900
	2016 to 2046	700	510	470	1,680	40	1,730	10	1,740	3,380	-160	3,220	50	3,270
Remaining Rural Areas	2016 to 2021	10	0	0	10	3	20	0	20	30	-10	20	0	20
	2016 to 2026	30	0	0	30	5	30	0	30	70	-10	60	0	60
	2016 to 2031	40	0	0	40	7	40	0	40	100	-10	90	0	90
	2016 to 2036	50	0	0	50	9	60	0	60	140	-10	130	0	130
	2016 to 2041	70	0	0	70	10	80	0	80	190	-10	170	0	170
	2016 to 2046	90	0	0	90	10	100	0	100	230	-20	210	0	210
Municipality of Kincardine Total	2016 to 2021	190	40	60	300	10	310	2	310	700	-90	600	8	610
	2016 to 2026	370	120	140	640	30	660	5	670	1,390	-80	1,310	20	1,330
	2016 to 2031	460	230	230	920	40	960	7	960	1,930	-80	1,850	30	1,870
	2016 to 2036	600	340	310	1,250	40	1,290	9	1,300	2,600	-100	2,490	30	2,530
	2016 to 2041	710	430	400	1,550	50	1,600	10	1,610	3,170	-140	3,040	40	3,080
	2016 to 2046	790	510	470	1,770	60	1,830	10	1,840	3,610	-180	3,430	50	3,480

Source: Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 6: Municipality of Northern Bruce Peninsula

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Lion's Head (S.U.A.)	2016 to 2021	60	0	0	60	0	60	5	70	170	0	170	20	190
	2016 to 2026	120	0	0	120	0	120	10	130	300	0	300	50	350
	2016 to 2031	150	0	0	150	0	150	20	160	390	0	380	60	440
	2016 to 2036	190	0	0	190	0	190	20	210	500	-10	490	80	570
	2016 to 2041	220	0	0	220	1	220	30	250	590	-10	580	100	680
	2016 to 2046	250	0	0	250	1	250	30	280	650	-10	650	110	760
Tobermory (S.U.A.)	2016 to 2021	20	0	0	20	0	20	20	40	60	-10	50	60	110
	2016 to 2026	40	0	0	40	1	50	40	80	120	0	110	140	250
	2016 to 2031	60	0	0	60	2	70	50	120	170	0	160	190	350
	2016 to 2036	90	0	0	90	2	90	70	160	240	-10	240	250	490
	2016 to 2041	120	0	0	120	2	120	90	210	320	-10	310	310	620
	2016 to 2046	150	0	0	150	2	150	100	250	390	-10	380	350	730
Urban Areas	2016 to 2021	90	0	0	90	0	90	20	110	230	-10	220	80	300
	2016 to 2026	160	0	0	160	1	160	50	210	420	-10	410	190	600
	2016 to 2031	210	0	0	210	2	210	70	280	550	-10	550	250	800
	2016 to 2036	280	0	0	280	2	280	90	380	730	-10	720	340	1,060
	2016 to 2041	340	0	0	340	3	350	110	460	900	-10	890	410	1,300
	2016 to 2046	400	0	0	400	3	400	130	530	1,040	-20	1,030	460	1,480
Remaining Rural Areas	2016 to 2021	110	0	0	110	2	110	190	310	300	-20	280	690	970
	2016 to 2026	200	0	0	200	3	200	470	670	510	-20	490	1,670	2,160
	2016 to 2031	240	0	0	240	4	240	630	870	620	-20	600	2,250	2,860
	2016 to 2036	290	0	0	290	6	300	840	1,140	770	-30	740	3,020	3,760
	2016 to 2041	330	0	0	330	7	340	1,020	1,360	870	-40	830	3,660	4,490
	2016 to 2046	350	0	0	350	10	360	1,150	1,510	930	-50	880	4,120	5,000
Municipality of Northern Bruce Peninsula Total	2016 to 2021	200	0	0	200	2	200	220	410	530	-30	500	770	1,270
	2016 to 2026	350	0	0	350	4	360	520	880	930	-30	900	1,860	2,760
	2016 to 2031	450	0	0	450	6	450	700	1,150	1,180	-30	1,150	2,500	3,650
	2016 to 2036	570	0	0	570	8	580	940	1,520	1,500	-40	1,470	3,350	4,820
	2016 to 2041	670	0	0	670	10	680	1,140	1,820	1,770	-50	1,720	4,070	5,790
	2016 to 2046	750	0	0	750	10	760	1,280	2,040	1,970	-60	1,910	4,580	6,480

Source: Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 7: Town of Saugeen Shores

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Saugeen Shores Urban Area	2016 to 2021	630	160	200	1,000	7	1,000	30	1,030	2,340	-110	2,230	100	2,330
	2016 to 2026	770	540	410	1,710	10	1,720	60	1,780	3,500	-100	3,400	220	3,620
	2016 to 2031	990	940	600	2,540	20	2,560	100	2,650	5,050	-100	4,960	350	5,310
	2016 to 2036	1,050	1,280	800	3,130	20	3,150	130	3,270	6,040	-120	5,920	450	6,370
	2016 to 2041	1,140	1,580	970	3,680	20	3,700	150	3,850	7,000	-160	6,840	540	7,380
	2016 to 2046	1,260	1,840	1,110	4,210	20	4,230	170	4,400	7,960	-210	7,750	620	8,370
Remaining Rural Areas	2016 to 2021	4	0	0	4	0	4	0	4	10	0	9	0	9
	2016 to 2026	9	0	0	9	0	9	0	9	20	0	20	0	20
	2016 to 2031	10	0	0	10	0	10	0	10	40	0	40	0	40
	2016 to 2036	20	0	0	20	0	20	0	20	50	0	50	0	50
	2016 to 2041	20	0	0	20	0	20	0	20	60	0	50	0	50
	2016 to 2046	30	0	0	30	0	30	0	30	70	0	70	0	70
Town of Saugeen Shores Total	2016 to 2021	630	160	200	1,000	7	1,010	30	1,040	2,350	-110	2,230	100	2,340
	2016 to 2026	770	540	410	1,720	10	1,730	60	1,790	3,520	-100	3,430	220	3,640
	2016 to 2031	1,010	940	600	2,550	20	2,570	100	2,670	5,090	-100	4,990	350	5,340
	2016 to 2036	1,070	1,280	800	3,150	20	3,170	130	3,290	6,090	-120	5,970	450	6,410
	2016 to 2041	1,160	1,580	970	3,700	20	3,720	150	3,870	7,060	-160	6,900	540	7,430
	2016 to 2046	1,280	1,840	1,110	4,230	20	4,260	170	4,430	8,030	-210	7,820	620	8,440

Source: Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 8: Municipality of South Bruce

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Formosa (P.U.A.)	2016 to 2021	2	0	0	2	0	2	0	2	5	-10	0	0	0
	2016 to 2026	5	0	0	5	0	5	0	5	10	0	9	0	9
	2016 to 2031	8	0	0	8	0	8	0	8	20	0	20	0	20
	2016 to 2036	10	0	0	10	0	10	0	10	30	-10	30	0	30
	2016 to 2041	20	0	0	20	0	20	0	20	50	-10	40	0	40
Mildmay (P.U.A.)	2016 to 2046	20	0	0	20	0	20	0	20	60	-10	50	0	50
	2016 to 2021	50	2	0	60	0	60	0	60	150	-20	130	0	130
	2016 to 2026	130	20	0	150	0	150	0	150	380	-10	360	0	360
	2016 to 2031	210	30	0	240	0	240	0	240	600	-10	590	0	590
	2016 to 2036	290	40	0	330	0	330	0	330	830	-20	810	0	810
Teeswater (P.U.A.)	2016 to 2041	360	60	0	420	0	420	0	420	1,050	-20	1,020	0	1,020
	2016 to 2046	400	70	0	470	0	470	0	470	1,170	-30	1,140	0	1,140
	2016 to 2021	5	0	0	5	0	5	0	5	10	-10	0	0	0
	2016 to 2026	20	0	0	20	0	20	0	20	40	-10	30	0	30
	2016 to 2031	30	0	0	30	0	30	0	30	70	-10	60	0	60
Urban Areas	2016 to 2036	40	0	0	40	0	40	0	40	100	-20	90	0	90
	2016 to 2041	50	0	0	50	0	50	0	50	140	-20	120	0	120
	2016 to 2046	70	0	0	70	0	70	0	70	180	-30	150	0	150
	2016 to 2021	60	2	0	60	0	60	0	60	170	-40	130	0	130
	2016 to 2026	160	20	0	170	0	170	0	170	430	-30	400	0	400
Remaining Rural Areas	2016 to 2031	250	30	0	270	0	270	0	270	690	-30	660	0	660
	2016 to 2036	340	40	0	380	0	380	0	380	970	-40	930	0	930
	2016 to 2041	430	60	0	490	0	490	0	490	1,230	-50	1,180	0	1,180
	2016 to 2046	490	70	0	560	0	560	0	560	1,400	-70	1,330	0	1,330
	2016 to 2021	10	0	0	10	7	20	0	20	30	-10	20	0	20
Municipality of South Bruce Total	2016 to 2026	30	0	0	30	10	40	1	40	70	-10	60	4	60
	2016 to 2031	40	0	0	40	20	50	1	50	100	-10	90	4	100
	2016 to 2036	50	0	0	50	20	70	2	70	130	-10	120	7	130
	2016 to 2041	60	0	0	60	20	80	3	90	160	-20	150	10	160
	2016 to 2046	70	0	0	70	20	90	3	90	180	-20	160	10	170
	2016 to 2021	70	2	0	70	7	80	0	80	200	-50	150	0	150
	2016 to 2026	180	20	0	200	10	210	1	210	500	-40	460	4	460
	2016 to 2031	280	30	0	310	20	330	1	330	790	-40	750	4	760
	2016 to 2036	390	40	0	430	20	450	2	450	1,100	-50	1,050	7	1,060
	2016 to 2041	500	60	0	550	20	570	3	570	1,390	-70	1,330	10	1,340
	2016 to 2046	560	70	0	620	20	650	3	650	1,580	-90	1,490	10	1,500

Source: Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 9: Town of South Bruce Peninsula

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Allenford (S.U.A.)	2016 to 2021	2	0	0	2	0	2	0	2	5	0	3	0	3
	2016 to 2026	3	0	0	3	0	3	0	3	8	0	7	0	7
	2016 to 2031	4	0	0	4	0	4	0	4	10	0	10	0	10
	2016 to 2036	5	0	0	5	0	5	0	5	10	0	10	0	10
	2016 to 2041	6	0	0	6	0	6	0	6	20	0	10	0	10
	2016 to 2046	7	0	0	7	0	7	0	7	20	0	20	0	20
Hepworth (S.U.A.)	2016 to 2021	10	0	0	10	0	10	0	10	30	0	30	0	30
	2016 to 2026	20	0	0	20	0	20	0	20	50	0	50	0	50
	2016 to 2031	30	0	0	30	0	30	0	30	70	0	70	0	70
	2016 to 2036	30	0	0	30	0	30	0	30	90	0	90	0	90
	2016 to 2041	40	0	0	40	0	40	0	40	110	-10	100	0	100
	2016 to 2046	50	0	0	50	0	50	0	50	120	-10	110	0	110
Sauble Beach (S.U.A.)	2016 to 2021	50	10	0	70	1	70	20	80	170	-20	150	50	200
	2016 to 2026	100	30	0	120	2	130	30	160	300	-20	290	120	400
	2016 to 2031	130	40	0	170	3	170	50	220	410	-20	390	160	560
	2016 to 2036	170	60	0	230	4	240	60	300	550	-20	530	220	750
	2016 to 2041	200	80	0	290	5	290	70	360	670	-30	640	270	910
	2016 to 2046	230	100	0	320	6	330	80	410	750	-30	720	290	1,010
Sauble Beach Serviced Area (P.U.A.)	2016 to 2021	2	0	0	2	0	2	3	5	5	0	4	10	10
	2016 to 2026	3	0	0	3	0	3	7	10	8	0	7	20	30
	2016 to 2031	4	0	0	4	0	4	9	10	10	0	10	30	40
	2016 to 2036	5	0	0	5	0	5	10	20	10	0	10	40	50
	2016 to 2041	6	0	0	6	0	6	20	20	20	0	10	50	70
	2016 to 2046	7	0	0	7	0	7	20	20	20	0	20	60	70
Wiarton (P.U.A.)	2016 to 2021	40	20	0	60	0	60	2	60	130	-20	120	7	130
	2016 to 2026	70	40	0	110	0	110	4	110	250	-10	240	10	250
	2016 to 2031	100	60	0	160	0	160	6	160	350	-10	340	20	360
	2016 to 2036	130	100	0	220	0	220	7	230	480	-20	470	30	490
	2016 to 2041	150	120	0	270	0	270	8	280	590	-20	570	30	600
	2016 to 2046	170	150	0	310	0	310	10	320	680	-30	650	40	680
Urban Areas	2016 to 2021	110	30	0	140	1	140	20	160	340	-40	300	70	370
	2016 to 2026	200	60	0	260	2	260	40	310	620	-30	590	160	750
	2016 to 2031	260	100	0	360	3	370	60	430	850	-30	820	220	1,040
	2016 to 2036	340	160	0	500	4	500	80	580	1,150	-40	1,100	290	1,390
	2016 to 2041	410	210	0	610	5	620	100	710	1,400	-60	1,340	350	1,690
	2016 to 2046	450	240	0	700	6	700	110	810	1,590	-80	1,510	380	1,900
Remaining Rural Areas	2016 to 2021	40	0	0	40	1	50	40	80	120	-30	90	140	230
	2016 to 2026	70	0	0	70	2	80	80	160	190	-30	170	290	460
	2016 to 2031	90	0	0	90	3	90	120	210	230	-30	200	420	620
	2016 to 2036	100	0	0	100	4	110	160	270	270	-30	230	590	820
	2016 to 2041	110	0	0	110	5	120	210	330	300	-40	260	740	1,000
	2016 to 2046	120	0	0	120	7	130	240	370	320	-60	260	850	1,110
Town of South Bruce Peninsula Total	2016 to 2021	150	30	0	180	2	180	60	240	460	-70	390	210	600
	2016 to 2026	270	60	0	330	4	340	130	460	810	-60	760	450	1,210
	2016 to 2031	350	100	0	450	6	450	180	630	1,080	-60	1,020	640	1,660
	2016 to 2036	440	160	0	600	8	610	250	850	1,410	-80	1,340	880	2,210
	2016 to 2041	520	210	0	730	10	740	300	1,040	1,700	-100	1,600	1,090	2,690
	2016 to 2046	580	240	0	820	10	830	340	1,170	1,910	-130	1,780	1,230	3,010

Source: Forecast by Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Appendix D: Local Municipal Employment Growth Forecast by Primary and Secondary Urban Communities, 2016 to 2046

Figure D - 1: Bruce County

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Primary Urban Areas	2016 to 2021	0	710	1,130	800	510	3,150	340	3,490	2,440
	2016 to 2026	0	1,010	1,740	1,330	860	4,940	730	5,670	3,930
	2016 to 2031	0	1,230	1,910	1,830	1,230	6,200	960	7,160	4,970
	2016 to 2036	0	1,530	2,280	2,290	1,550	7,650	1,240	8,890	6,120
	2016 to 2041	0	1,840	2,520	2,730	1,850	8,940	1,450	10,390	7,100
	2016 to 2046	0	2,020	2,770	3,060	2,090	9,940	1,640	11,580	7,920
Remaining Rural Areas	2016 to 2021	70	90	120	90	0	370	50	420	280
	2016 to 2026	140	130	200	150	0	620	110	730	490
	2016 to 2031	210	210	260	190	0	870	170	1,040	660
	2016 to 2036	260	190	340	240	0	1,030	140	1,170	840
	2016 to 2041	310	220	390	280	0	1,200	160	1,360	980
	2016 to 2046	350	240	440	310	0	1,340	180	1,520	1,100
Bruce County Total	2016 to 2021	70	800	1,250	890	510	3,520	390	3,910	2,720
	2016 to 2026	140	1,140	1,940	1,480	860	5,560	840	6,400	4,420
	2016 to 2031	210	1,440	2,170	2,020	1,230	7,070	1,130	8,200	5,630
	2016 to 2036	260	1,720	2,620	2,530	1,550	8,680	1,380	10,060	6,960
	2016 to 2041	310	2,060	2,910	3,010	1,850	10,140	1,610	11,750	8,080
	2016 to 2046	350	2,260	3,210	3,370	2,090	11,280	1,820	13,100	9,020

Source: Forecast by Watson & Associates Economists Ltd., 2021.

Figure D - 2: Municipality of Arran-Elderslie

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Allenford (S.U.A.)	2016 to 2021	0	1	0	0	0	1	0	1	0
	2016 to 2026	0	2	0	0	0	2	1	3	0
	2016 to 2031	0	2	0	0	0	2	1	3	0
	2016 to 2036	0	3	0	0	0	3	1	4	0
	2016 to 2041	0	3	0	0	0	3	1	4	0
	2016 to 2046	0	3	0	0	0	3	1	4	0
Paisley (P.U.A.)	2016 to 2021	0	3	0	7	0	10	1	11	7
	2016 to 2026	0	5	0	10	0	15	2	17	10
	2016 to 2031	0	7	0	10	0	17	2	19	10
	2016 to 2036	0	8	0	10	0	18	3	21	10
	2016 to 2041	0	9	0	20	0	29	3	32	20
	2016 to 2046	0	9	0	20	0	29	4	33	20
Chesley (P.U.A.)	2016 to 2021	0	20	50	5	30	105	8	113	85
	2016 to 2026	0	30	80	7	40	157	10	167	127
	2016 to 2031	0	40	90	8	60	198	20	218	158
	2016 to 2036	0	50	100	10	70	230	20	250	180
	2016 to 2041	0	50	120	10	90	270	20	290	220
	2016 to 2046	0	60	120	10	90	280	20	300	220
Tara (P.U.A.)	2016 to 2021	0	10	0	5	20	35	6	40	25
	2016 to 2026	0	20	0	6	30	56	7	63	36
	2016 to 2031	0	30	0	8	40	78	9	87	48
	2016 to 2036	0	30	0	9	50	89	10	99	59
	2016 to 2041	0	40	0	10	60	110	10	120	70
	2016 to 2046	0	40	0	10	60	110	10	120	70
Arran-Elderslie Urban Areas	2016 to 2021	0	34	50	17	50	151	15	165	117
	2016 to 2026	0	57	80	23	70	230	20	250	173
	2016 to 2031	0	79	90	26	100	295	32	327	216
	2016 to 2036	0	91	100	29	120	340	34	374	249
	2016 to 2041	0	102	120	40	150	412	34	446	310
	2016 to 2046	0	112	120	40	150	422	35	457	310
Remaining Rural Areas	2016 to 2021	-1	6	10	1	0	16	2	18	10
	2016 to 2026	-3	10	20	3	0	30	4	34	20
	2016 to 2031	-1	20	20	3	0	42	6	48	22
	2016 to 2036	-6	20	20	4	0	38	8	46	18
	2016 to 2041	-4	30	20	6	0	52	10	62	22
	2016 to 2046	-11	30	30	7	0	56	10	66	26
Municipality of Arran-Elderslie Total	2016 to 2021	-1	40	60	18	50	167	17	184	127
	2016 to 2026	-3	67	100	26	70	260	24	284	193
	2016 to 2031	-1	99	110	29	100	337	38	375	238
	2016 to 2036	-6	111	120	33	120	378	42	420	267
	2016 to 2041	-4	132	140	46	150	464	44	508	332
	2016 to 2046	-11	142	150	47	150	478	45	523	336

Source: Forecast by Watson & Associates Economists Ltd., 2021.

Figure D - 3: Municipality of Brockton

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Elmwood (S.U.A.)	2016 to 2021	0	2	0	1	0	3	1	4	1
	2016 to 2026	0	4	0	5	0	9	3	12	5
	2016 to 2031	0	5	0	9	0	14	4	18	9
	2016 to 2036	0	7	0	10	0	17	6	23	10
	2016 to 2041	0	8	0	20	0	28	7	35	20
	2016 to 2046	0	9	0	20	0	29	7	36	20
Walkerton (P.U.A.)	2016 to 2021	0	70	70	30	30	200	30	230	130
	2016 to 2026	0	120	120	120	110	470	80	550	350
	2016 to 2031	0	170	150	200	200	720	130	850	550
	2016 to 2036	0	200	170	270	280	920	170	1,090	720
	2016 to 2041	0	250	200	350	340	1,140	200	1,340	890
	2016 to 2046	0	280	210	390	390	1,270	230	1,500	990
Brockton Urban Areas	2016 to 2021	0	72	70	31	30	203	31	234	131
	2016 to 2026	0	124	120	125	110	479	83	562	355
	2016 to 2031	0	175	150	209	200	734	134	868	559
	2016 to 2036	0	207	170	280	280	937	176	1,113	730
	2016 to 2041	0	258	200	370	340	1,168	207	1,375	910
	2016 to 2046	0	289	210	410	390	1,299	237	1,536	1,010
Remaining Rural Areas	2016 to 2021	10	2	10	2	0	23	1	24	22
	2016 to 2026	20	5	20	6	0	51	3	54	46
	2016 to 2031	40	7	20	10	0	77	5	82	70
	2016 to 2036	60	9	30	10	0	109	7	116	100
	2016 to 2041	70	10	30	20	0	130	9	139	120
	2016 to 2046	90	10	30	20	0	150	10	160	140
Municipality of Brockton Total	2016 to 2021	10	74	80	33	30	226	32	258	153
	2016 to 2026	20	129	140	131	110	530	86	616	401
	2016 to 2031	40	182	170	219	200	811	139	950	629
	2016 to 2036	60	216	200	290	280	1,046	183	1,229	830
	2016 to 2041	70	268	230	390	340	1,298	216	1,514	1,030
	2016 to 2046	90	299	240	430	390	1,449	247	1,696	1,150

Source: Forecast by Watson & Associates Economists Ltd., 2021.

Figure D - 4: Township of Huron-Kinloss

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Huron-Kinloss Shoreline (S.U.A.)	2016 to 2021	0	80	0	10	10	100	30	130	20
	2016 to 2026	0	120	0	20	30	170	50	220	50
	2016 to 2031	0	150	0	30	30	210	70	280	60
	2016 to 2036	0	180	0	30	40	250	80	330	70
	2016 to 2041	0	200	0	40	40	280	90	370	80
	2016 to 2046	0	210	0	40	50	300	100	400	90
Lucknow (P.U.A.)	2016 to 2021	0	20	0	3	1	24	5	29	4
	2016 to 2026	0	30	0	7	4	41	10	51	11
	2016 to 2031	0	40	0	9	5	54	20	74	14
	2016 to 2036	0	50	0	10	7	67	30	97	17
	2016 to 2041	0	70	0	10	9	89	30	119	19
	2016 to 2046	0	80	0	20	10	110	40	150	30
Ripley (P.U.A.)	2016 to 2021	0	40	10	6	7	63	10	73	23
	2016 to 2026	0	50	30	20	20	120	20	140	70
	2016 to 2031	0	70	30	20	20	140	30	170	70
	2016 to 2036	0	90	40	20	30	180	40	220	90
	2016 to 2041	0	110	50	30	30	220	50	270	110
	2016 to 2046	0	120	50	30	40	240	60	300	120
Huron-Kinloss Urban Areas	2016 to 2021	0	140	10	19	18	187	45	232	47
	2016 to 2026	0	200	30	47	54	331	80	411	131
	2016 to 2031	0	260	30	59	55	404	120	524	144
	2016 to 2036	0	320	40	60	77	497	150	647	177
	2016 to 2041	0	380	50	80	79	589	170	759	209
	2016 to 2046	0	410	50	90	100	650	200	850	240
Remaining Rural Areas	2016 to 2021	10	6	10	4	0	30	2	31	24
	2016 to 2026	20	10	30	8	0	68	4	72	58
	2016 to 2031	30	10	30	10	0	80	6	86	70
	2016 to 2036	40	20	40	10	0	110	8	118	90
	2016 to 2041	50	20	50	10	0	130	9	139	110
	2016 to 2046	50	20	60	20	0	150	10	160	130
Township of Huron-Kinloss Total	2016 to 2021	10	146	20	23	18	217	47	264	71
	2016 to 2026	20	210	60	55	54	399	84	483	189
	2016 to 2031	30	270	60	69	55	484	126	610	214
	2016 to 2036	40	340	80	70	77	607	158	765	267
	2016 to 2041	50	400	100	90	79	719	179	898	319
	2016 to 2046	50	430	110	110	100	800	210	1,010	370

Source: Forecast by Watson & Associates Economists Ltd., 2021.

Figure D - 5: Municipality of Kincardine

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPWW)	Total (Excluding Work at Home)
Kincardine (P.U.A)	2016 to 2021	0	120	140	150	100	510	60	570	390
	2016 to 2026	0	150	230	270	170	820	110	930	670
	2016 to 2031	0	180	240	360	230	1,010	160	1,170	830
	2016 to 2036	0	210	290	480	310	1,290	210	1,500	1,080
	2016 to 2041	0	250	320	590	380	1,540	250	1,790	1,290
Kincardine Urban Partial Services (S.U.A.)	2016 to 2046	0	270	350	660	430	1,710	290	2,000	1,440
	2016 to 2021	0	30	730	0	0	760	20	780	730
	2016 to 2026	0	30	1,130	0	0	1,160	30	1,190	1,130
	2016 to 2031	0	30	1,210	0	0	1,240	30	1,270	1,210
	2016 to 2036	0	40	1,440	0	0	1,480	40	1,520	1,440
Tiverton (P.U.A.)	2016 to 2041	0	40	1,590	0	0	1,630	40	1,670	1,590
	2016 to 2046	0	40	1,760	0	0	1,800	40	1,840	1,760
	2016 to 2021	0	10	0	20	10	40	6	46	30
	2016 to 2026	0	20	0	40	20	80	10	90	60
	2016 to 2031	0	20	0	50	30	100	20	120	80
Kincardine Urban Areas	2016 to 2036	0	20	0	70	30	120	20	140	100
	2016 to 2041	0	30	0	80	40	150	30	180	120
	2016 to 2046	0	30	0	90	50	170	30	200	140
	2016 to 2021	0	160	870	170	110	1,310	86	1,396	1,150
	2016 to 2026	0	200	1,360	310	190	2,060	150	2,210	1,860
On-Site Bruce Power Jobs	2016 to 2031	0	230	1,450	410	260	2,350	210	2,560	2,120
	2016 to 2036	0	270	1,730	550	340	2,890	270	3,160	2,620
	2016 to 2041	0	320	1,910	670	420	3,320	320	3,640	3,000
	2016 to 2046	0	340	2,110	750	480	3,680	360	4,040	3,340
	2016 to 2021	0	0	1,200	0	0	1,200	0	1,200	1,200
Remaining Rural Areas	2016 to 2026	0	0	1,400	0	0	1,400	0	1,400	1,400
	2016 to 2031	0	0	1,430	0	0	1,430	0	1,430	1,430
	2016 to 2036	0	0	900	0	0	900	0	900	900
	2016 to 2041	0	0	450	0	0	450	0	450	450
	2016 to 2046	0	0	100	0	0	100	0	100	100
Municipality of Kincardine Total	2016 to 2021	20	6	40	9	0	75	3	78	69
	2016 to 2026	40	10	80	20	0	150	7	157	140
	2016 to 2031	60	10	120	20	0	210	10	220	200
	2016 to 2036	70	10	160	30	0	270	10	280	260
	2016 to 2041	70	20	180	40	0	310	20	330	290
Municipality of Kincardine Total	2016 to 2046	80	20	210	40	0	350	20	370	330
	2016 to 2021	20	166	2,110	179	110	2,585	89	2,674	2,419
	2016 to 2026	40	210	2,840	330	190	3,610	157	3,767	3,400
	2016 to 2031	60	240	3,000	430	260	3,990	220	4,210	3,750
	2016 to 2036	70	280	2,790	580	340	4,060	280	4,340	3,780
Municipality of Kincardine Total	2016 to 2041	70	340	2,540	710	420	4,080	340	4,420	3,740
	2016 to 2046	80	360	2,420	790	480	4,130	380	4,510	3,770

Source: Forecast by Watson & Associates Economists Ltd., 2021.

Figure D - 6: Municipality of Northern Bruce Peninsula

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Lion's Head (S.U.A.)	2016 to 2021	0	30	0	9	30	69	20	89	39
	2016 to 2026	0	40	0	10	50	100	20	120	60
	2016 to 2031	0	40	0	20	60	120	30	150	80
	2016 to 2036	0	50	0	20	80	150	40	190	100
	2016 to 2041	0	60	0	30	100	190	40	230	130
Tobermory (S.U.A.)	2016 to 2021	0	8	5	30	7	50	5	55	42
	2016 to 2026	0	10	7	40	10	67	8	75	57
	2016 to 2031	0	20	8	50	20	98	10	108	78
	2016 to 2036	0	20	10	70	20	120	20	140	100
	2016 to 2041	0	30	10	80	20	140	20	160	110
Northern Bruce Peninsula Urban Areas	2016 to 2021	0	38	5	39	37	119	25	144	81
	2016 to 2026	0	50	7	50	60	167	28	195	117
	2016 to 2031	0	60	8	70	80	218	40	258	158
	2016 to 2036	0	70	10	90	100	270	60	330	200
	2016 to 2041	0	90	10	110	120	330	60	390	240
Remaining Rural Areas	2016 to 2021	0	40	10	30	0	80	30	110	40
	2016 to 2026	0	60	20	50	0	130	40	170	70
	2016 to 2031	0	70	30	60	0	160	50	210	90
	2016 to 2036	0	80	30	70	0	180	50	230	100
	2016 to 2041	0	90	40	80	0	210	60	270	120
Municipality of Northern Bruce Peninsula Total	2016 to 2021	0	78	15	69	37	199	55	254	121
	2016 to 2026	0	110	27	100	60	297	68	365	187
	2016 to 2031	0	130	38	130	80	378	90	468	248
	2016 to 2036	0	150	40	160	100	450	110	560	300
	2016 to 2041	0	180	50	190	120	540	120	660	360
Municipality of Northern Bruce Peninsula Total	2016 to 2046	0	200	50	200	140	590	140	730	390

Source: Forecast by Watson & Associates Economists Ltd., 2021.

Figure D - 7: Town of Saugeen Shores

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Saugeen Shores Urban Area	2016 to 2021	0	160	100	460	180	900	100	1,000	740
	2016 to 2026	0	190	130	650	270	1,240	150	1,390	1,050
	2016 to 2031	0	260	150	910	380	1,700	220	1,920	1,440
	2016 to 2036	0	290	170	1,070	450	1,980	280	2,260	1,690
	2016 to 2041	0	350	190	1,220	520	2,280	330	2,610	1,930
	2016 to 2046	0	390	210	1,380	590	2,570	380	2,950	2,180
Remaining Rural Areas	2016 to 2021	0	1	10	10	0	21	0	21	20
	2016 to 2026	0	1	20	20	0	41	1	42	40
	2016 to 2031	0	2	20	20	0	42	2	43	40
	2016 to 2036	0	2	20	30	0	52	2	54	50
	2016 to 2041	0	3	20	30	0	53	3	55	50
	2016 to 2046	0	3	30	40	0	73	3	77	70
Town of Saugeen Shores Total	2016 to 2021	0	161	110	470	180	921	100	1,021	760
	2016 to 2026	0	191	150	670	270	1,281	151	1,432	1,090
	2016 to 2031	0	262	170	930	380	1,742	222	1,963	1,480
	2016 to 2036	0	292	190	1,100	450	2,032	282	2,314	1,740
	2016 to 2041	0	353	210	1,250	520	2,333	333	2,665	1,980
	2016 to 2046	0	393	240	1,420	590	2,643	383	3,027	2,250

Source: Forecast by Watson & Associates Economists Ltd., 2021.

Figure D - 8: Municipality of South Bruce

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Formosa (P.U.A.)	2016 to 2021	0	1	5	3	1	10	0	10	9
	2016 to 2026	0	2	6	6	3	17	2	19	15
	2016 to 2031	0	2	7	9	4	22	2	24	20
	2016 to 2036	0	5	10	10	6	31	4	35	26
	2016 to 2041	0	6	10	20	7	43	4	47	37
	2016 to 2046	0	7	10	20	8	45	5	50	38
Midmay (P.U.A.)	2016 to 2021	0	60	10	8	3	81	10	91	21
	2016 to 2026	0	90	20	20	7	137	80	217	47
	2016 to 2031	0	70	20	20	10	120	60	180	50
	2016 to 2036	0	140	30	30	10	210	100	310	70
	2016 to 2041	0	170	30	40	20	260	110	370	90
	2016 to 2046	0	180	40	40	20	280	130	410	100
Teeswater (P.U.A.)	2016 to 2021	0	4	0	6	2	13	1	14	8
	2016 to 2026	0	7	0	10	4	21	6	27	14
	2016 to 2031	0	6	0	20	7	33	5	38	27
	2016 to 2036	0	10	0	20	9	39	10	49	29
	2016 to 2041	0	20	0	20	10	50	10	60	30
	2016 to 2046	0	20	0	30	10	60	20	80	40
South Bruce Urban Areas	2016 to 2021	0	65	15	17	6	104	11	115	38
	2016 to 2026	0	99	26	36	14	175	88	263	76
	2016 to 2031	0	78	27	49	21	175	67	242	97
	2016 to 2036	0	155	40	60	25	280	114	394	125
	2016 to 2041	0	196	40	80	37	353	124	477	157
	2016 to 2046	0	207	50	90	38	385	155	540	178
Remaining Rural Areas	2016 to 2021	20	9	8	3	0	39	2	41	31
	2016 to 2026	50	10	10	6	0	76	10	86	66
	2016 to 2031	60	70	10	9	0	149	50	199	79
	2016 to 2036	70	20	20	10	0	120	20	140	100
	2016 to 2041	80	20	20	10	0	130	20	150	110
	2016 to 2046	100	30	20	20	0	170	20	190	140
Municipality of South Bruce Total	2016 to 2021	20	74	23	21	6	143	13	156	69
	2016 to 2026	50	109	36	42	14	251	98	349	142
	2016 to 2031	60	148	37	58	21	324	117	441	176
	2016 to 2036	70	175	60	70	25	400	134	534	225
	2016 to 2041	80	216	60	90	37	483	144	627	267
	2016 to 2046	100	237	70	110	38	555	175	730	318

Source: Forecast by Watson & Associates Economists Ltd., 2021.

Figure D - 9: Town of South Bruce Peninsula

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Allenford (S.U.A.)	2016 to 2026	0	0	0	0	0	0	0	0	0
	2016 to 2031	0	0	0	0	0	0	0	0	0
	2016 to 2036	0	0	0	0	0	0	0	0	0
	2016 to 2041	0	0	0	0	0	0	0	0	0
	2016 to 2046	0	0	0	0	0	0	0	0	0
Hepworth (S.U.A.)	2016 to 2026	0	7	0	4	4	15	10	25	8
	2016 to 2031	0	8	0	5	5	18	10	28	10
	2016 to 2036	0	9	0	7	6	22	10	32	13
	2016 to 2041	0	10	0	9	7	26	10	36	16
	2016 to 2046	0	10	0	10	8	28	20	48	18
Sauble Beach (S.U.A.)	2016 to 2026	0	40	0	20	30	90	60	150	50
	2016 to 2031	0	50	0	30	30	110	70	180	60
	2016 to 2036	0	60	0	40	40	140	80	220	80
	2016 to 2041	0	70	0	50	50	170	90	260	100
	2016 to 2046	0	80	0	60	50	190	100	290	110
Sauble Beach Serviced Area (P.U.A.)	2016 to 2026	0	0	0	3	3	6	0	6	6
	2016 to 2031	0	0	0	4	4	8	0	8	8
	2016 to 2036	0	0	0	6	5	11	0	11	11
	2016 to 2041	0	0	0	7	5	12	0	12	12
	2016 to 2046	0	0	0	8	6	14	0	14	14
Wiarton (P.U.A.)	2016 to 2026	0	30	4	50	70	154	50	204	124
	2016 to 2031	0	40	6	60	90	196	60	256	156
	2016 to 2036	0	50	8	90	110	258	70	328	208
	2016 to 2041	0	70	9	110	130	319	80	399	249
	2016 to 2046	0	70	10	120	140	340	90	430	270
South Bruce Peninsula Urban Areas	2016 to 2026	0	77	4	77	107	265	120	385	188
	2016 to 2031	0	98	6	99	129	332	140	472	234
	2016 to 2036	0	119	8	143	161	431	160	591	312
	2016 to 2041	0	150	9	176	192	527	180	707	377
	2016 to 2046	0	160	10	198	204	572	210	782	412
Remaining Rural Areas	2016 to 2021	6	20	4	30	0	60	10	70	40
	2016 to 2026	20	20	9	50	0	99	30	129	79
	2016 to 2031	20	20	10	60	0	110	40	150	90
	2016 to 2036	30	30	20	80	0	160	30	190	130
	2016 to 2041	40	30	20	90	0	180	40	220	150
Town of South Bruce Peninsula Total	2016 to 2021	6	75	6	84	75	246	53	299	171
	2016 to 2026	20	97	13	127	107	364	150	514	267
	2016 to 2031	20	118	16	159	129	442	180	622	324
	2016 to 2036	30	149	28	223	161	591	190	781	442
	2016 to 2041	40	180	29	266	192	707	220	927	527
	2016 to 2046	40	190	30	288	204	752	250	1,002	562

Source: Forecast by Watson & Associates Economists Ltd., 2021.

Appendix E: Local Municipal Residential Land Needs by Primary and Secondary Urban Community, 2021 to 2046

Local Municipality	Primary and Secondary Urban Communities	Unit Capacity of Vacant Residential Lands ¹	Units in Active Development Plans	Total Housing Unit Supply on Vacant Lands	Intensification Supply (10%)	Total Supply Including Intensification	Unit Forecast, 2021 to 2046	Unit Surplus/Deficit
		A	B	C = A + B	D	E = C + D	F	G = E - F
Municipality of Arran-Elderslie	Chesley	270	80	350	40	390	160	230
	Paisley	390	-	390	40	430	30	400
	Tara	210	60	270	30	300	130	170
	Total	890	140	1,030	100	1,130	320	810
Municipality of Brockton	Walkerton	140	907	1,047	100	1,147	1,470	- 323
	Total	140	907	1,047	100	1,147	1,470	- 323
Township of Huron-Kinloss	Huron-Kinloss Shoreline	490	90	580	60	640	390	250
	Lucknow	250	-	250	30	280	310	- 30
	Ripley	120	110	230	20	250	210	40
	Total	910	200	1,110	110	1,220	910	310
Municipality of Kincardine	Kincardine	1,820	590	2,410	240	2,650	1,190	1,460
	Kincardine Urban partial service	440	-	440	40	480	110	370
	Tiverton	320	-	320	30	350	100	250
	Total	2,630	590	3,220	320	3,540	1,400	2,140
Municipality of Northern Bruce Peninsula	Lion's Head	150	60	210	20	230	180	50
	Tobermory	1,830	10	1,840	180	2,020	130	1,890
	Total	2,000	80	2,080	210	2,290	310	1,980
Town of Saugeen Shores	Saugeen Shores Urban	2,260	1,960	4,220	420	4,640	3,210	1,430
	Total	2,450	1,960	4,410	440	4,850	3,210	1,640
Municipality of South Bruce	Formosa	220	-	220	20	240	20	220
	Mildmay	250	160	410	40	450	410	40
	Teeswater	290	-	290	30	320	60	260
	Total	770	160	930	90	1,020	490	530
Town of South Bruce Peninsula	Allenford (SBP)	10	-	10	-	10	10	-
	Hepworth	130	-	130	10	140	30	110
	Sauble Beach	1,940	60	2,000	200	2,200	260	1,940
	Sauble Beach Serviced Area	30	-	30	-	30	10	20
	Warton	430	90	520	50	570	260	310
	Total	2,560	150	2,710	270	2,980	560	2,420
Grand Total		12,360	3,610	15,970	1,600	17,570	8,680	8,890

Source: Watson & Associates Economists Ltd., 2021.

Note: Numbers may not add correctly due to rounding.

¹ Supply from 2020 adjusted to 2021, based on short-term demand forecast.

Appendix F: Local Municipal Non-Residential Land Needs by Primary and Secondary Urban Community, 2021 to 2046

Development Location	Vacant Employment Land Supply (net ha)	Employment Land Demand (net ha)	Employment Area Land Surplus / Shortfall
Allenford (S.U.A.)	0	0	0
Paisley (P.U.A.)	0	0	0
Chesley (P.U.A.)	9	7	3
Tara (P.U.A.)	0	0	0
Arran-Elderslie Urban Areas	10	7	3
Walkerton (P.U.A.)	14	19	-5
Brockton Urban Areas	14	19	-5
Huron-Kinloss Shoreline (S.U.A.)	0	0	0
Lucknow (P.U.A.)	0	0	0
Ripley (P.U.A.)	4	4	0
Huron-Kinloss Urban Areas	4	4	0
Kincardine (P.U.A.)	32	28	4
Kincardine Urban Partial Services (S.U.A.)	165	79	85
Tiverton (P.U.A.)	0	0	0
Kincardine Urban Areas	197	107	89
Lion's Head (S.U.A.)	0	0	0
Tobermory (S.U.A.)	8	2	6
Northern Bruce Peninsula Urban Areas	8	2	6
Saugeen Shores Urban Area	7	27	-20
Saugeen Shores Urban Area	7	27	-20
Formosa (P.U.A.)	1	1	0
Mildmay (P.U.A.)	4	3	1
Teeswater (P.U.A.)	0	0	0
South Bruce Urban Areas	6	4	2
Hepworth (S.U.A.)	0	0	0
Sauble Beach (S.U.A.)	0	0	0
Sauble Beach Serviced Area (P.U.A.)	0	0	0
Warton (P.U.A.)	7	4	3
South Bruce Peninsula Urban Areas	7	4	3
Bruce County Urban Areas	253	175	78

Source: Watson & Associates Economists Ltd., 2021.

Note: Employment Area land shortfalls identified for Saugeen Shores and Brockton do not include additional lands associated with local infrastructure and (e.g. local roads, stormwater ponds, utility easements, etc.), which is estimated to represent approximately 20% of anticipated net land needs. Employment Area expansion within Saugeen Shores and Brockton may also need to consider additional land need adjustments associated with non-developable environmental areas/natural features and/or hazard areas.

Note: P.U.A. an abbreviation for Primary Urban Areas and S.U.A. an abbreviation for Secondary Urban Areas.

Note: Numbers may not add correctly due to rounding.